

The Economic Impact of Expenditures by Travelers On Minnesota's Southern Region and The Profile of Travelers

June 2007 – May 2008

Prepared for:

Explore Minnesota Tourism
State of Minnesota



UNIVERSITY OF MINNESOTA



**and
Southern Minnesota Tourism Association**

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1.0 Introduction

This is the second report of the Economic Impact of Traveler Expenditures on the Southern Region prepared by *Davidson-Peterson Associates*. The research approach employed is designed to capture economic impact data (i.e., economic impact of traveler expenditures on the state of Minnesota) and traveler profile data concurrently. This report covers traveler expenditures made in the Southern Region during the 12-month period from June 2007 through May 2008. A similar 12-month study was conducted for same period in 2005-2006.

The primary purpose of this study is to measure the economic benefits the Southern Region residents and governments derive from the dollars spent by travelers in the region.

These economic benefits include:

- **Total expenditures** made by travelers;
- Number of **full-time equivalent jobs** supported by these expenditures;
- **Wages, salaries and proprietary income** earned by area residents as a result of these expenditures; and
- **State and local government revenues** generated by traveler expenditures.

The economic impact estimates in this report may be used to document the importance of tourism as a key segment of the Southern Region's economy; to underscore the need to continue to support the expenditure of time, effort and dollars to promote tourism growth; and to track the results of the Southern Region's tourism marketing efforts.

In addition, the traveler on-site interviews used in the economic impact analysis are presented as a traveler profile in Section 7.0 of this report. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period.

Please refer to Appendix A for a description of the procedures used in executing this study and for definitions of the terms used.

2.0 Executive Summary

2.1 Introduction

Davidson-Peterson Associates was hired to conduct a year-long study which was a joint project with Explore Minnesota Tourism, the University of Minnesota Tourism Center* and the Minnesota Arrowhead, Minnesota Heartland and Southern Minnesota Tourism Associations and the Metro Tourism Committee. Davidson-Peterson Associates was commissioned to conduct a “bottom-up” analysis of traveler expenditures in Minnesota and their impact on the economy of the state during the period June 2007 through May 2008. (See Appendix A, Sections A through C for details on the “bottom-up” approach.)

The economic impact analysis for June 2007 through May 2008 is based on the following surveys:

- Telephone interviews were conducted with a random sample of accommodations managers in the Southern Region upon conclusion of each season. A total of 2,044 interviews were completed statewide, 434 of which were completed in this region.
- Self-administered questionnaires were completed by 2,023 Minnesota travelers statewide who were either staying overnight or had traveled at least 50 miles from home on a day trip. These questionnaires were completed during each of the four seasons and in each of the four regions. Please refer to Appendix A: Procedures (Section D.5) for more detailed information on the sampling approach by region.
- A total of 1,000 telephone interviews were conducted with a probability sample of Minnesota households equally divided among the four seasons.

Total estimated traveler expenditures by category of expense were provided to Dr. William Shaffer of Georgia Tech to develop an input-output model based on the Southern Region’s economy. The input-output model estimated the number of full-time equivalent jobs, wages/salaries/proprietary income, and state and local government revenues supported by traveler expenditures.

* The University of Minnesota Tourism Center is a collaboration of the College of Food, Agricultural and Natural Resource Sciences and the University of Minnesota Extension Service.

Additionally, Davidson-Peterson Associates used the self-administered questionnaires conducted among Minnesota travelers in the Southern Region to provide a traveler profile for that region. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period. The combined data yield results that are more reliable and representative than the results for either of the two interview periods alone – the effect of roughly doubling the sample size and including traveler interviews at a broader selection of traveler sites.

In total, 1,098 interviews were conducted in the Southern Region during the two study periods combined. Using the findings from the state economic impact study, the sample was balanced across *regions* and *seasons*. The Southern Region traveler profile results are based on a weighted sample of 823. (See Appendix A, Section F for details on weighting procedures.)

2.2 The Findings

In total, travelers in the Southern Region spent \$2.1 billion in the region. Half of the region's traveler expenditures were spent by travelers staying overnight in hotels/motels/B&Bs. More than one-third of total traveler expenditures were spent in the summer season.

The \$2.1 billion spent in the Southern Region from June 2007 through May 2008 supported 46,400 full-time-equivalent jobs, \$943.0 million in resident income (wages, salaries and proprietary income), \$252.3 million in state government revenues and \$76.5 million in local government revenues.

The Southern Region received 7.63 million person-visits during the period June 2007 through May 2008. The majority of person-visits in the Southern Region were by travelers staying overnight (5.72 million or 75%) while the remainder were made by travelers on day trips (1.91 million or 25%). Similar proportions of total visits to the Southern Region were made by travelers staying at hotels/motels/B&Bs (31%) and by travelers staying with friends and relatives (32%). Campgrounds (11%) and resorts (1%) accommodated the balance of overnight person-visits.

Some 312 hotels/motels/B&Bs with 13,683 rooms offered 4.92 million room nights and sold 2.95 million to guests staying fewer than 30 nights during the period of June 2007 through May 2008. As noted, travelers staying in these rooms made the largest contribution to the traveler expenditures in the Southern Region.

A total of 49 resorts with 327 units made 0.09 million unit-nights available and sold 0.04 million unit-nights to guests staying fewer than 30 nights during the 12-month period.

A total of 149 campgrounds on both public and private lands with 9,911 sites made those sites available for 1.97 million site-nights and sold 0.69 million site-nights to guests staying fewer than 30 nights.

Those numbers led to occupancy rates of 60% for hotels/motels/B&Bs, 49% for resorts and 35% for campgrounds.

According to managers' estimates, more than half of the guests who stayed in the Southern Region properties were Minnesota residents – 61% in hotels; 70% in campgrounds; and 62% in resorts.

Managers estimated that hotel/motel/B&B guests came on average in parties of two and stayed two or three nights; resort guests came in parties of three or four and stayed three nights, and campers came in parties of three and stayed two or three nights.

The table on the following page summarizes the industry highlights for the period June 2007 through May 2008.

2.3 Southern Region Lodging and Campground Industry Highlights Table 2.3

Table 2.3

The Southern Region Lodging and Campground Industry Highlights

June 2007 - May 2008

	<u>Hotels/Motels/ B&Bs</u>	<u>Resorts</u>	<u>Campgrounds</u>
Number of properties	312	49	149
Number of rooms/units/sites	13,683	327	9,911
Total available room-nights/unit-nights/site-nights (millions)	4.92	0.09	1.97
Total occupied room-nights/unit-nights/ site-nights (millions)	2.95	0.04	0.69
Average occupancy rate	60%	49%	35%
Average daily room rate	\$84.19	--	--
Average unit rate	--	\$132.91	--
Average site rate	--	--	\$25.40
MANAGEMENT'S ESTIMATES:			
Average party size	1.90	3.54	3.01
Average length of stay	2.51	3.23	2.56
Guest Origin			
<u>Out of State</u>	<u>39%</u>	<u>38%</u>	<u>30%</u>
U.S.	33%	38%	29%
Canada	3%	*	1%
Other foreign	2%	*	1%
Minnesota	61%	62%	70%
Trip Purpose¹			
Pleasure	50%	87%	N/A
Business	39%	13%	N/A
Meeting/convention	12%	--	N/A

Note: Length of stay as noted throughout this document represents the average number of nights spent in a single property. It does not necessarily reflect the total number of nights spent in Minnesota. Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

¹ These statistics not collected for campers

3.0 Estimates of Traveler Expenditures in Minnesota

3.1 Summary

Travelers to the Southern Region during the period of June 2007 through May 2008 spent **\$2.1 billion** in the state.

- Half of those dollars were spent by travelers staying at hotels/motels/B&Bs and resorts;
- Food, shopping and recreation account for three-quarters of all the dollars spent by travelers; and
- More than one-third of the dollars were spent during the summer.

3.2 Overall Expenditures

The Southern Region travelers spent an estimated total of **\$2.1 billion** in the period June 2007 through May 2008.

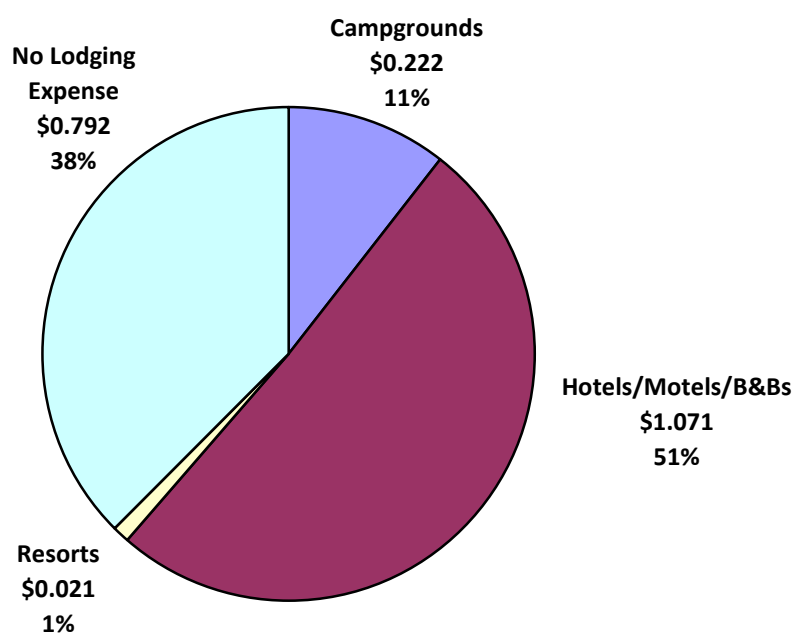
3.3 Estimated Traveler Expenditures By Accommodation Type

Half of the total estimated traveler expenditures, \$1.07 billion (51%), were spent by travelers staying overnight in the Southern Region at hotels/motels/B&Bs. Those staying in resorts in the Southern Region spent \$21.40 million (1%), and those camping spent \$221.88 million (11%).

Travelers with no lodging expenses (i.e., those staying at homes of family/friends or daytrippers) spent \$792.0 million, or 38% of the Southern Region's traveler expenditures.

- Travelers who stayed at the homes of family and/or friends spent \$737.18 million (35%) while visiting the Southern Region.
- Those visiting just for the day or passing through the Southern Region spent \$54.77 million (3%).

Figure 3.3
Estimated Southern Region Traveler Expenditures
By Accommodation Type
June 2007 – May 2008
(\$ Billions)



Total: \$2.106 Billion

3.4 Estimated Traveler Expenditures By Category of Expenditure

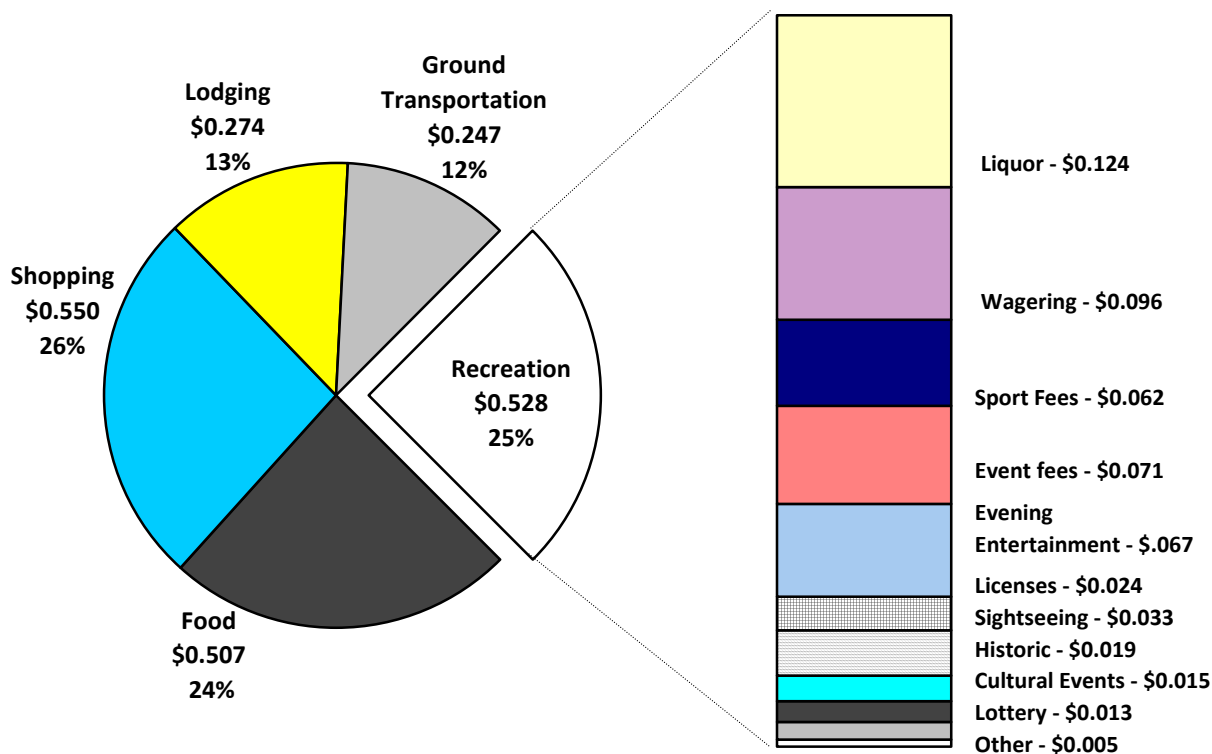
Shopping, food and recreation each accounted for about one quarter (24%-26%) of traveler expenditures.

Lodging expenses represented 13% of the total estimated traveler expenditures (\$273.87 million).

Twelve percent of the Southern Region traveler expenditures (\$247.14 million) were spent on ground transportation.

Figure 3.4

Estimated Southern Region Traveler Expenditures
By Category of Expenditure
June 2007 - May 2008
(\$ Billions)



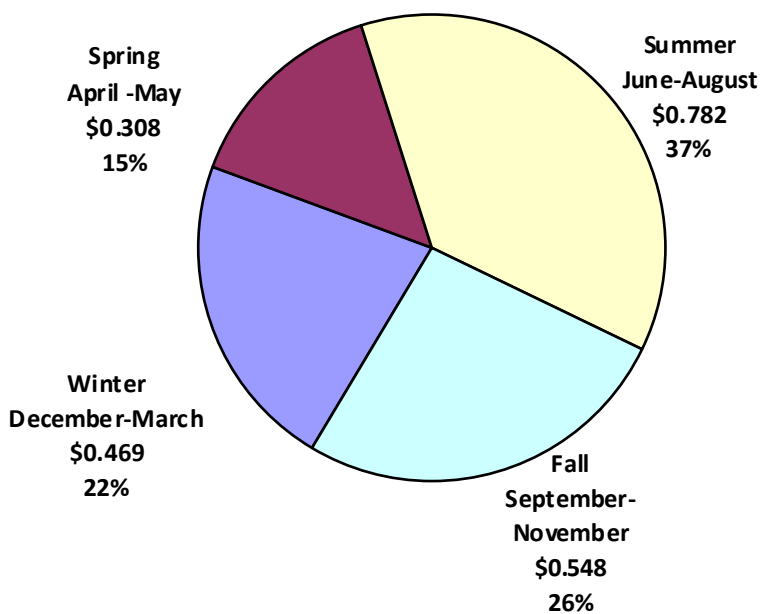
Total: \$2.106 Billion

3.5 Estimated Traveler Expenditures By Season

Travelers spent \$782.33 million, or 37% of all traveler expenditures, in the summer season (June through August). They spent \$547.83 million, or 26% of all traveler expenditures, in the fall season (September through November) and \$468.81 million, or 22% of total traveler expenditures, in the winter season (December through March). Finally, travelers spent \$307.53million, or 15% of all traveler expenditures, in the spring season (April through May).

Figure 3.5

Estimated Traveler Expenditures
By Season
June 2007 – May 2008
(\$ Billions)



Total: \$2.106 Billion

4.0 The Impact of Traveler Expenditures on the Southern Region

4.1 Summary

The estimated expenditures by travelers in the Southern Region during the period June 2007 through May 2008 supported 46,400 full-time-equivalent jobs and provided residents with wages, salaries and proprietary income of \$943.0 million. Traveler expenditures also generated \$252.3 million in state government revenues and \$76.5 million in local government revenues.

4.2 Direct and Total Impact: An Explanation

In the text and figures which follow to describe the impact of traveler expenditures on Minnesota, both direct and total impacts are mentioned.

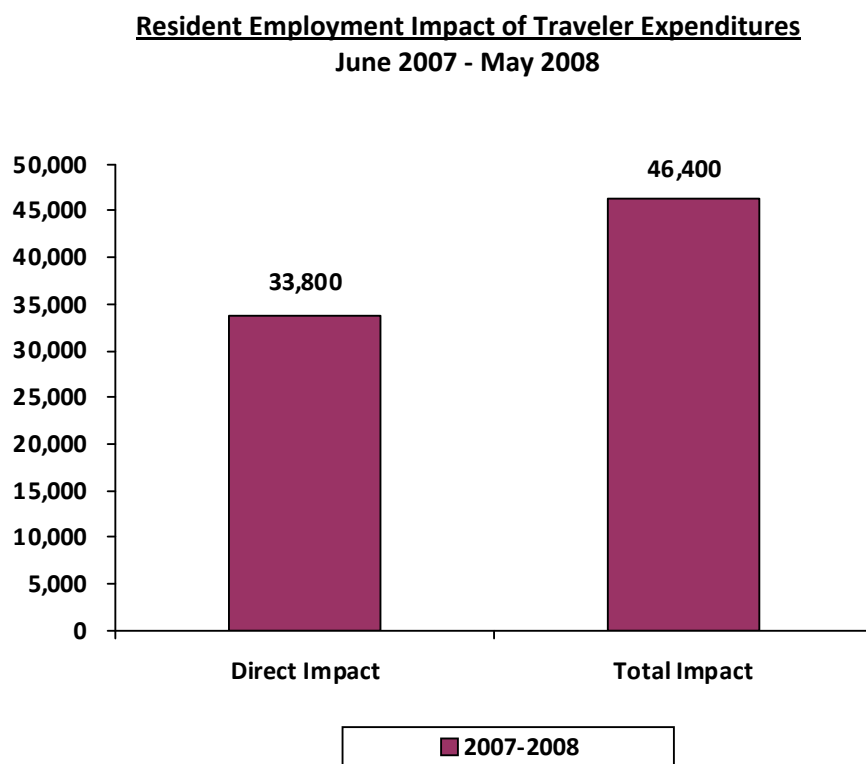
- **Direct** impacts are those economic benefits due directly to the traveler expenditures. For example, when traveler expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and wages.
- **Total** impacts include all of the direct impacts but also include the estimated indirect impacts. Indirect impacts are the additional jobs and wages supported during additional rounds of spending. For example, the front desk clerk pays income tax and property tax which are an indirect result of tourist expenditures. The front desk clerk also pays her utility bills, buys food for her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

As noted, this report includes direct and total impacts which include both direct and indirect impacts.

4.3 Impact on Jobs for the Southern Region

During the period June 2007 through May 2008, traveler expenditures in the Southern Region supported 46,400 full-time equivalent jobs in **total**. About three quarters of these jobs (73%) were **directly** supported by total estimated traveler expenditures in the Southern Region (33,800).

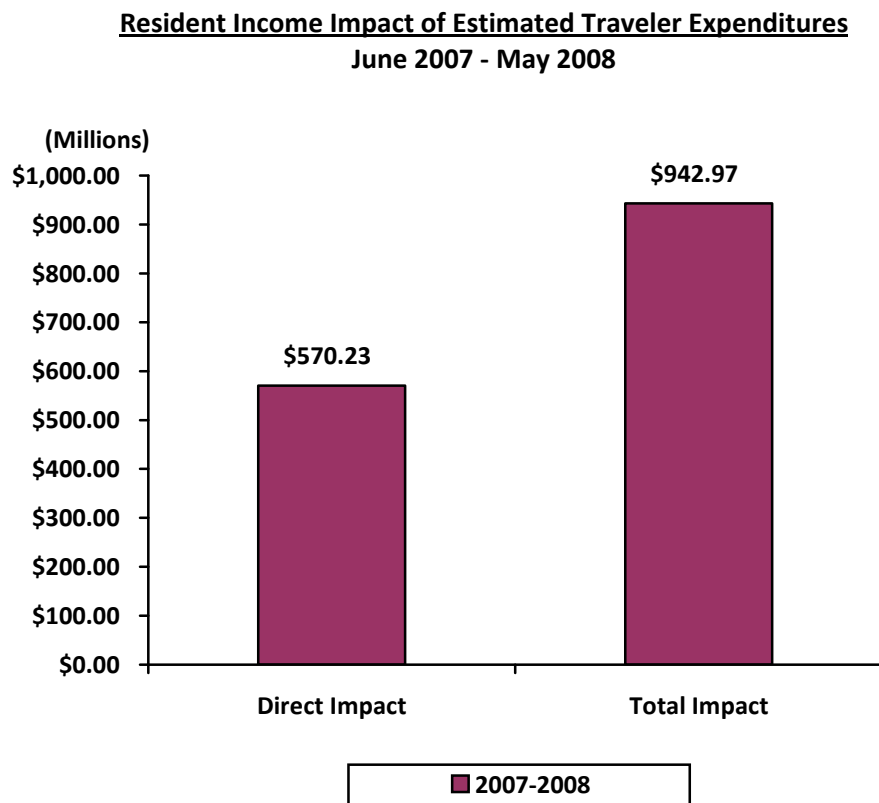
Figure 4.3



4.4 Impact on Wages, Salaries and Proprietary Income for the Southern Region

Traveler expenditures in the Southern Region during the period June 2007 through May 2008 generated \$942.97 million in resident wages and proprietary income in **total**. Nearly two-thirds of this resident income was **directly** generated by traveler expenditures (\$570.23 million or 61%).

Figure 4.4



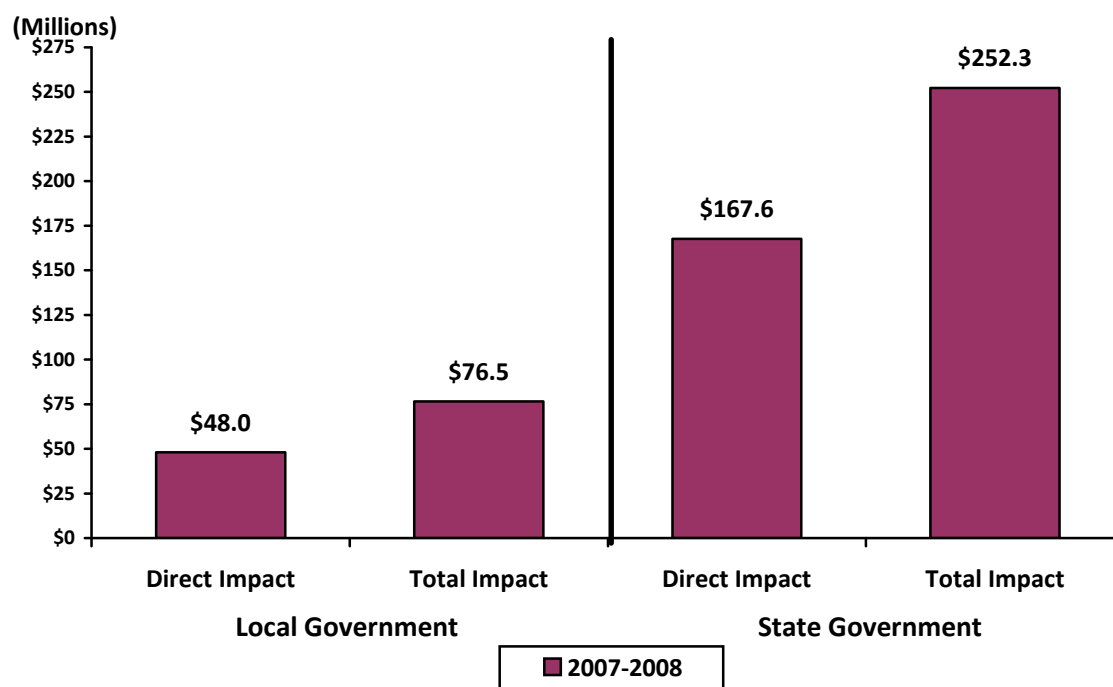
4.5 Impact on State and Local Government Revenues

Traveler expenditures in the Southern Region led to the receipt of \$252.3 million in state government revenues and \$76.5 million in local government revenues in **total** during the period June 2007 through May 2008.

During the period June 2007 through May 2008 the state government collected \$167.6 million and local governments collected \$48.0 million that were **directly** attributable to traveler expenditures.

Figure 4.5

**Impact of Traveler Expenditures on
State and Local Government Revenues**
June 2007 - May 2008



5.0 The Southern Region Lodging and Campground Industry

5.1 Summary

For **hotels/motels/B&Bs**, about two-thirds of the available rooms nights were sold at an average rate of \$84. Travelers typically traveled as parties of two and stayed two or three nights. Half of the travelers were on pleasure trips and two-fifths on business trips. Three in five of the rooms were booked by Minnesota residents and two in five by out-of-state travelers.

While **resort** unit rates were higher (\$133/night), the party size was likely to be three or four and they stayed three nights. About half the resort units offered were rented. Three in five resort guests were Minnesota residents.

Campground sites were rented at an average rate of \$25 per night with an occupancy rate of 35%. Campers traveled in parties of three and stayed an average of two or three nights. Two-thirds of campers were Minnesota residents.

5.2 Hotel/Motel/B&B Inventory

During June 2007 through May 2008, 312 properties with 13,683 rooms made 5 million room-nights available to the public and sold 2.95 million of those room-nights to travelers staying for fewer than 30 nights.

5.3 Hotel/Motel/B&B Room Rates and Occupancy

The overall average daily room rate at Southern Region hotels/motels/B&Bs was \$84.19 during June 2007 through May 2008.

Hotels/Motels/B&Bs had an average occupancy rate of 60%.

Table 5.3

Room Rates and Occupancy by Season ***(Hotels/Motels/ B&Bs)***

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Average daily room rates*	\$84.19	\$84.11	\$83.51	\$83.64	\$86.80
Average occupancy*	60%	74%	65%	49%	54%
Total available room-nights (in millions)	4.92	1.24	1.24	1.62	0.82
Total occupied room-nights (in millions)	2.95	0.92	0.80	0.79	0.44

*The bases for these statistics are weighted by the number of rooms that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied room-nights as a percentage of total available room-nights, excluding from both figures any rooms rented for 30 nights or more.

5.4 Hotel/Motel/B&B Guest Party Size and Length of Stay

Hotel/motel/B&B property managers reported that their guests typically traveled in parties of two and stayed an average of two or three nights.

Table 5.4

Managements' Estimate:
Average Guest Party Size and Length of Stay by Season
(Hotels/Motels/B&Bs)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Average party size*	1.90	2.06	1.94	1.83	1.78
Average length of stay*	2.51	2.62	2.43	2.50	2.46

*The bases for these statistics are weighted by the number of rooms that are open in each season. Yearly averages are weighted by season.

5.5 Hotel/Motel/B&B Guest Trip Purpose and Guest Origin

Hotel/motel/B&B property managers reported that half of their guests were traveling either for business (39%) or to attend meetings and conventions (12%). The remaining guests were traveling for pleasure (50%).

Managers reported that three in five of their guests were Minnesota residents (61%).

Table 5.5
Managements' Estimate:
Trip Purpose and Guest Origin by Season
(Hotels/Motels/B&Bs)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Trip Purpose					
Pleasure	50%	44%	54%	49%	52%
Business	39%	41%	35%	39%	40%
Meetings/conventions	12%	15%	12%	12%	9%
Guest Origin					
<u>Out of state</u>	<u>39%</u>	<u>37%</u>	<u>38%</u>	<u>39%</u>	<u>40%</u>
U.S.	33%	32%	32%	34%	36%
Canada	3%	2%	4%	3%	2%
Other foreign	2%	3%	2%	2%	2%
Minnesota	61%	63%	62%	61%	60%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%.

5.6 Resort Inventory

Some 49 resorts had 327 units available to the public. Resorts made 90 thousand unit-nights available over the 12-month period and sold 40 thousand unit-nights to guests who stayed fewer than 30 nights.

5.7 Resort Unit Rates and Occupancy

The average unit rate for a resort was \$132.91 during the period June 2007 through May 2008.

Occupancy rates for resorts averaged 49%.

Table 5.7

Unit Rates and Occupancy by Season
(Resorts)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Average daily unit rates*	\$132.91	\$143.90	\$172.82	\$81.98	84.56
Average occupancy*	49%	75%	30%	40%	34%
Total available unit-nights (in millions)	0.09	0.03	0.02	0.02	0.02
Total occupied unit-nights (in millions)	0.04	0.02	0.01	0.01	0.01

*The bases for these statistics are weighted by the number of units that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied unit-nights as a percentage of total available unit-nights, excluding from both figures any units rented for 30 nights or more.

5.8 Resort Guest Party Size and Length of Stay

Property managers of the Southern Region resorts reported that guests at their locations usually traveled in groups of three or four and stayed three nights on average.

Table 5.8

Management's Estimate:
Average Guest Party Size and Length of Stay By Season
(Resorts)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Average travel party size	3.54	3.78	4.41	1.98	3.74
Average length of stay	3.23	4.16	2.22	1.98	2.51

5.9 Resort Trip Purpose and Guest Origin

According to property managers' estimates, the majority of resort guests (87%) were traveling on a pleasure trip.

Managers reported that three in five guests were Minnesota residents (62%), while the remaining guests lived outside the state.

Table 5.9

**Management's Estimate:
Trip Purpose and Guest Origin by Season
(Resorts)**

	June 2007- May 2008 TOTAL	June- August 2007	September- November 2007	December 2007-March 2008	April- May 2008
Trip Purpose					
Pleasure	87%	97%	94%	52%	89%
Business	13%	3%	6%	48%	11%
Meetings/conventions	--	--	--	--	--
Guest Origin:					
<u>Out of State</u>	<u>38%</u>	<u>45%</u>	<u>27%</u>	<u>34%</u>	<u>39%</u>
U.S.	38%	44%	27%	34%	39%
Canada	*	*	--	--	--
Other Foreign	*	*	--	--	--
Minnesota	62%	55%	73%	66%	61%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%.

5.10 Campground Inventory

The Southern Region campground providers offered 9,911 sites in 149 campgrounds to the public for use during the 2007-2008 year. That yielded a total of 1.97 million site-nights available, with 0.69 million site-nights sold to guests staying fewer than 30 nights. Campgrounds on both public and private lands are included in the inventory.

5.11 Campground Site Rates and Occupancy

The average rate for a campground site was \$25.40.

Occupancy rates for the Southern Region campgrounds were 35% for the 12-month period. Occupancy rates were highest in the summer (51%) and lowest in the winter (3%).

Table 5.11

Site Rates and Occupancy by Season
(Campgrounds)

	June 2007- May 2008 TOTAL	June- August 2007	September- November 2007	December 2007-March 2008	April- May 2008
Average site rate*	\$25.40	\$26.48	\$21.78	N/A	\$27.34
Average occupancy*	35%	51%	31%	3%	21%
Total available site-nights (in millions)	1.97	0.87	0.50	0.20	0.40
Total occupied site-nights (in millions)	0.69	0.45	0.15	0.01	0.09

*The bases for these statistics are weighted by the number of sites that are open in each quarter. Yearly averages are weighted by quarter.

N/A: Campgrounds surveyed had sites available for short-term rental but no guests during the December 2007 through March 2008 time period, and therefore, had no figures to report. Projections were made for the balance of the campgrounds based on the averages from all campgrounds surveyed across the state in the winter season.

Note: Average occupancy is calculated by taking total occupied site-nights as a percentage of total available site-nights, excluding from both figures any rooms rented for 30 nights or more.

5.12 Campground Guest Party Size and Length of Stay

The Southern Region campers typically traveled in parties of three and spent an average of two to three nights while visiting, according to campground managers.

Table 5.12

Management's Estimate:
Average Guest Party Size and Length of Stay by Season
(Campgrounds)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Average travel party size	3.01	3.28	2.72	N/A	2.88
Average length of stay	2.56	2.82	2.33	N/A	2.31

N/A: Campgrounds surveyed had sites available for short-term rental but no guests during the December 2007 – March 2008 time period, and therefore, had no figures to report.

5.13 Campground Guest Origin

The Southern Region campground managers reported that two Southern Region campers in three (70%) were Minnesota residents.

Table 5.13
Management's Estimate:
Guest Origin by Season
(Campgrounds)

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Guest Origin:					
<u>Out of State</u>	<u>30%</u>	<u>37%</u>	<u>23%</u>	<u>N/A</u>	<u>27%</u>
U.S.	29%	36%	22%	N/A	26%
Canada	1%	1%	*	N/A	*
Other Foreign	1%	1%	1%	N/A	*
Minnesota	70%	63%	77%	N/A	73%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%.

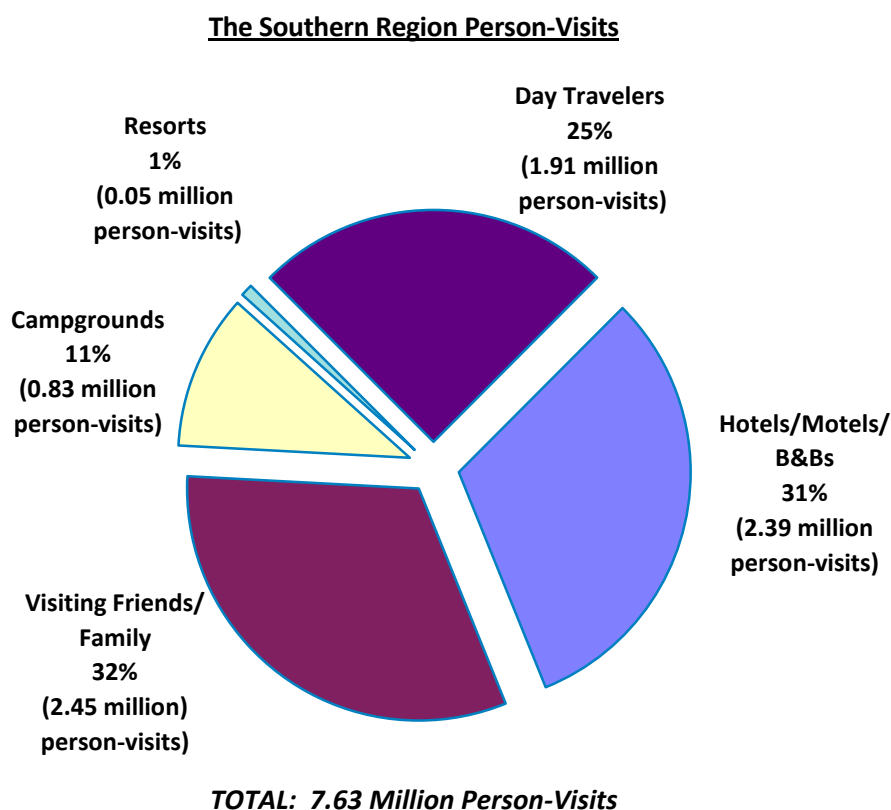
N/A: Campgrounds surveyed had sites available for short-term rental during the December 2007 – March 2008 time period but no guests during this time period, and therefore, had no figures to report.

6.0 Travel Volume in the Southern Region

Person-visits in the Southern Region totaled 7.63 million during the period June 2007 through May 2008. A total of 5.72 million were overnight person-visits – one person staying in one accommodation. In addition, day travelers in the Southern Region were estimated at 1.91 million.

Hotel/motel/B&B guests represented 31% of person-visits while travelers staying with family and/or friends represented 32%. Campers accounted for 11% of person-visits while travelers staying in resorts made up 1% of the person-visits in the Southern Region in June 2007 through May 2008.

Figure 6.0



Note: A **person-visit** is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Minnesota travels to many locations in Minnesota, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 7.63 million person-visits should not necessarily be interpreted as 7.63 million travelers.

7.0 The Profile of the Southern Region Travelers

This section details the findings concerning the profile of Southern Region travelers overall and by each season during the period from June through May. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period. The combined data yield results that are more reliable and representative than the results for either of the two interview periods alone – the effect of roughly doubling the sample size and including traveler interviews at a broader selection of traveler sites.

7.1 Demographic and Socioeconomic Profile

- The average age of travelers in the Southern Region was 47.3 years. On average the profile is similar across all four seasons. However, the average age of travelers in the spring (49.6) was higher than travelers in the fall (45.3).
- The median household income of visitors to the Southern Region was \$71,200. Overall, there were no significant differences in the median household income among travelers by season.
- Nine travelers in ten in this region (94%) identified themselves as white.
- Virtually all of the Southern Region travelers (98%) lived in the United States and nearly half (47%) were from Minnesota. Beyond Minnesota, the leading states of residence among Southern Region travelers were Iowa (10%) and Wisconsin (8%).

The proportion of in-state travelers was highest during the summer (52%) and fall (57%) and lowest in the winter (34%) and spring (43%).

- More than a third of Southern Region travelers (37%) lived in the Minneapolis-St. Paul Designated Market Area (DMA)*. This proportion was lower in the winter season (21%) than in other seasons (34% to 43%). The incidence of Southern Region travelers who reside in any other DMA was 6% or less.

*Designated Market Area or DMA is a group of counties in the United States that are covered by a specific group of television stations. There are 210 DMAs in the United States.

Table 7.1
Demographic and Socioeconomic Profile

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	823	326	192	186	119
Age:					
18 to 24	7%	6%	12%	5%	5%
25 to 29	7	7	9	5	6
30 to 39	16	16	14	17	13
40 to 49	23	22	23	26	25
50 to 59	20	20	18	22	19
60 to 64	12	10	12	15	10
65 and older	12	12	10	9	19
No Answer	4	7	1	2	2
Average Age	47.3	47.4	45.3	47.8	49.6
Income:					
Less than \$25,000	6%	5%	8%	5%	6%
\$25,000 to \$34,999	7	8	9	5	6
\$35,000 to \$49,999	14	15	15	12	11
\$50,000 to \$74,999	18	18	16	18	21
\$75,000 to \$99,999	18	15	20	24	12
\$100,000 to \$124,999	11	11	9	10	14
\$125,000 to \$149,999	4	4	3	7	3
\$150,000 or more	7	5	4	8	12
No Answer	15	19	15	11	15
Estimated Median Income	\$71,200	\$67,700	\$66,100	\$79,700	\$73,500
Gender:					
Female	51%	57%	57%	40%	47%
Male	45	40	39	57	50
No Answer	3	3	5	3	3
Racial/Ethnic Background:					
White	94%	94%	93%	94%	94%
American Indian	1	1	1	1	1
Asian	1	*	1	1	*
Black	1	2	2	*	1
Hispanic	1	1	2	2	1
Other	1	1	*	*	2
No Answer	2	3	2	2	1

* Less than 0.5%

Table 7.1 (cont'd)
Demographic and Socioeconomic Profile

2005-2006 and 2007-2008 Combined

	June-May Total	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	823	326	192	186	119
Residence:					
<u>United States</u>	<u>98%</u>	<u>98%</u>	<u>99%</u>	<u>98%</u>	<u>95%</u>
Minnesota	47	52	57	34	43
Iowa	10	10	5	11	12
Wisconsin	8	9	10	8	5
Illinois	3	2	6	2	3
South Dakota	3	3	3	3	1
Michigan	2	3	*	4	1
California	2	1	2	4	1
Texas	2	2	*	2	3
Nebraska	2	2	1	2	2
Other state	11	9	7	16	17
State not specified	8	5	8	14	8
Canada	1	1	*	*	1
Another Country	1	*	*	2	3
No Answer	*	1	*	*	*
Residence by DMA:					
Minneapolis – St. Paul	37	43	43	21	34
Rochester –Mason City Austin	6	4	7	9	6
Sioux Falls (Mitchell)	3	3	5	3	2
Cedar Rapids-Waterloo- Iowa City & Dubuque	3	3	4	4	3
Mankato	3	4	4	2	4
Des Moines -Ames	3	4	*	3	7
La Crosse-Eau Claire	3	3	4	3	1
Milwaukee	2	2	2	2	1
Chicago	2	1	2	1	3
Other DMA's	27	25	20	37	28

* Less than 0.5%

Note: States with responses less than 2% among the total sample have been aggregated into the "Other state" category. DMAs with responses less than 2% among the total sample have been aggregated into the "Other DMAs" category.

7.2 Travel Party and Trip Profile

Travel Party

- Overall, nearly half of travelers in the Southern Region were on a vacation or short pleasure trip (45%). One traveler in three was traveling for personal reasons such as to attend a wedding, funeral, medical, etc. (32%). The remainder were traveling for business or work (15%) or a convention or conference (10%).

Travelers in the summer (62%) and fall (46%) were the more likely to be traveling for pleasure when compared with winter and spring travelers. Travelers in the winter were more likely to be traveling for personal reasons, e.g. wedding, funeral, medical, etc. (41%) and spring travelers more likely to be traveling for business or work (29%) than were summer or fall travelers.

- The average travel party size in the Southern Region was 2.6 people. The average party size was larger in the summer (2.8) compared to the spring (2.4).
- The average number of nights that travelers intended to stay was 3.2 nights. The length of stay among overnight travelers in the Southern Region was shorter in the fall (2.6 nights) than in the summer (3.1 nights), winter (3.7 nights), and spring (3.7 nights).
- Three-fourths of the visitors to the Southern Region did not have any children under 18 years old in their travel party (74%). Travelers with children under 18 were more prevalent in the summer (33%) and winter (28%).
- The majority of Southern Region travelers had taken one or more trips in Minnesota in the last five years (82%). The estimated median number of trips in the past five years was 5.7 trips. Travelers in the winter and spring seasons were more likely to say they had not taken any Minnesota trips in the past 5 years (22% winter and spring vs. 14% summer and 11% fall).

Trip Profile

- Just over two-thirds of travelers in the Southern Region stayed overnight in *paid* accommodations (70%), primarily hotels/motels/historic inns (59%). One traveler in ten stayed in *unpaid* accommodations (13%). Some 17% of travelers said they were taking a *day trip* and did not stay in any type of overnight accommodations on their trip.

The proportion of travelers staying in hotels/motels/historic inns was lower in the summer (44%) than in the fall (59%), winter (78%), and spring (71%). Summer travelers were more likely to stay in an RV (13%) or tent (7%) at a campground than were travelers in other seasons. Fall season travelers were more likely than travelers in other seasons to stay at the home of family or friends (21% fall vs. 12% summer, 5% winter, and 10% spring). Day trippers were more prevalent in the summer (23%) than the fall (11%) or spring (14%).

- Southern Region travelers participated in a variety of activities during their trip. Dining out (69%), shopping (46%), visiting friends or relatives (27%), and sightseeing or driving for pleasure (22%) were among the most frequently mentioned trip activities.

General Activities

Dining out was mentioned most often in all seasons, but was more prevalent in the winter (81%) and spring (72%) and less so in the summer (61%). Sightseeing or driving for pleasure was mentioned most often in the summer (29%) than in the fall (16%) or winter (15%). Taking in city sites was mentioned as a trip activity less frequently by travelers in the winter (8%) than by those in other seasons (16% to 18%). Similarly, driving on designated scenic byways was mentioned less often among winter travelers (4% in winter vs. 11% to 15% in other seasons). Fall travelers were more likely to mention nightlife or evening entertainment (21%) and viewing fall colors (20%) than were travelers in other seasons. Casino gambling was more prevalent in the summer (14%).

Shopping

Nearly half of Southern Region travelers did some type of shopping during their trip (46%). The shopping activities mentioned most often overall were general or mall shopping (23%) and shopping for gifts or souvenirs (22%). Travelers in the fall were more likely to be shopping for arts, crafts and antiques (25%) than were travelers in other seasons, especially when compared to winter travelers (6%). Mentions of general or mall shopping were higher in the fall and winter (27% each) than they were in the spring (15%).

Visiting People or Places

Just over one-fourth of Southern Region travelers mentioned they were visiting friends and relatives (27%). One in ten said they were visiting historic sites (13%), state or national parks (10%), and other [than art] museums (9%). Fall season travelers were more likely than travelers in other seasons to be visiting friends or relatives (39%), art museums (15%), amusement parks or carnivals (13%), Indian areas (11%), and indoor water parks (10%) than were travelers in the summer, winter, or spring. The incidence of visiting friends or relatives was also higher among summer travelers (27%) than among travelers in winter and spring (19%). Both summer and fall travelers were more likely than winter travelers to visit historic sites, state or national parks, and other [than art] museums.

Active Recreation

More than a third of Southern Region travelers participated in “active” recreation (37%) on their trip, with a higher proportion in the summer and fall (40% and 46%) than in winter and spring (31% and 23%). This included pool swimming (11%), hiking (8%), biking (6%), fishing (6%) and wildlife viewing or bird watching (5%). Travelers in the summer mentioned hiking (13%) and fishing (10%) more often than did travelers in the other seasons. Biking was a more prevalent activity in both the summer (7%) and fall (11%).

Attending Events

One in three travelers to the Southern Region mentioned that they had attended one or more events during their visit (35%). The specific types of events named most often were fairs and festivals (9%) and amateur sporting events (8%). The incidence of attending amateur sporting events was highest in the winter (20%), fairs or festivals was highest in the fall (19%), and popular music concerts was highest in the spring (10%).

Table 7.2
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	823	326	192	186	119
Trip Purpose (multi-response):					
Vacation or short pleasure trip	45%	62%	46%	28%	25%
Personal (wedding, funeral, medical, etc.)	32	29	28	41	35
Business or work	15	5	17	22	29
Convention or conference	10	7	13	10	15
No Answer	1	1	2	*	*
Travel Party Size:					
1 person	16%	12%	16%	19%	21%
2 people	43	43	47	41	45
3 to 4 people	28	32	23	29	26
5 or more people	12	13	14	11	8
Average Travel Party Size	2.6	2.8	2.6	2.6	2.4
Total Trip Length of Stay:					
Daytripper	17%	23%	11%	16%	14%
1 night	25	23	26	21	33
2 nights	27	23	36	29	20
3 to 6 nights	21	22	22	22	16
7 or more nights	9	9	5	11	16
Average Nights (Excluding Daytrippers)	3.2	3.1	2.6	3.7	3.7
Children in Travel Party					
One or more children under 18 years old	26%	33%	17%	28%	18%
No children	74	67	83	72	82
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	90%	86%	92%	90%	93%
One or more	10	14	8	10	7
<i>6 to 11 years old</i>					
None	86%	81%	91%	88%	88%
One or more	14	19	9	12	12
<i>12 to 17 years old</i>					
None	89%	86%	94%	86%	93%
One or more	11	14	6	14	7

* Less than 0.5%.

Table 7.2 (cont'd)
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June-May	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	<u>Total</u> 823	326	192	186	119
Minnesota Trips in Last 5 Years					
None	16%	14%	11%	22%	22%
1 trip	7	10	5	7	7
2 to 4 trips	22	23	24	20	21
5 to 10 trips	23	19	31	22	21
More than 10 trips	29	31	28	29	28
No Answer	2	3	1	*	1
Estimated Median Trips	5.7	5.3	6.5	5.5	4.9
Lodging:					
<u>Paid Accommodations</u>	<u>70%</u>	<u>64%</u>	<u>66%</u>	<u>79%</u>	<u>75%</u>
Hotel/Motel/Historic Inn	59	44	59	78	71
In an RV at a campground	6	13	2	*	3
In a tent at a campground	3	7	*	*	*
Bed & Breakfast	1	*	2	1	*
Resort	1	*	3	*	1
Vacation home/condo/cabin/houseboat you rented	*	*	*	*	*
<u>Unpaid Accommodations</u>	<u>13%</u>	<u>13%</u>	<u>23%</u>	<u>5%</u>	<u>11%</u>
Home of family or friends	12	12	21	5	10
Vacation home/condo/cabin/houseboat of family or friend	*	*	1	*	*
At your vacation home/condo/cabin/ houseboat	*	*	*	*	*
At a campground with no fee	*	*	*	*	1
<u>Day tripper</u>	<u>17%</u>	<u>23%</u>	<u>11%</u>	<u>16%</u>	<u>14%</u>

* Less than 0.5%.

Table 7.2 (cont'd)
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	823	326	192	186	119
Activities:					
<u>General (checked one or more below)</u>	<u>81%</u>	<u>78%</u>	<u>82%</u>	<u>84%</u>	<u>81%</u>
Dining out	69	61	68	81	72
Sightseeing or driving for pleasure	22	29	16	15	22
Taking in city sites	14	16	17	8	18
Driving on designated scenic byways	12	15	14	4	11
Nightlife or evening entertainment	11	7	21	8	10
Casino gaming	8	14	3	4	8
Viewing fall colors	6	2	20	*	*
<u>Shopping (checked one or more below)</u>	<u>46%</u>	<u>41%</u>	<u>51%</u>	<u>51%</u>	<u>46%</u>
General or mall shopping	23	22	27	27	15
For gifts or souvenirs	22	21	26	20	20
Arts, crafts, or antiques	14	11	25	6	17
Outlet shopping	11	10	13	10	9
At the Mall of America	7	4	12	7	8
<u>Visiting (checked one or more below)</u>	<u>49%</u>	<u>54%</u>	<u>55%</u>	<u>40%</u>	<u>38%</u>
Friends or relatives	27	27	39	19	19
Historic sites	13	16	16	5	11
State or national parks	10	13	14	2	4
Other museums	9	10	14	4	4
Art museums	7	6	15	4	5
Indian areas	5	6	11	1	3
Amusement parks or carnivals	5	5	13	1	1
Indoor water parks	4	3	10	4	1
Outdoor water parks	5	6	10	*	*
Other attraction	9	6	16	9	7

Table 7.2 (cont'd)
Travel Party and Trip Profile

2005-2006 and 2007-2008 Combined

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
Base:	823	326	192	186	119
<u>Participating In (checked one or more below)</u>	<u>37%</u>	<u>40%</u>	<u>46%</u>	<u>31%</u>	<u>23%</u>
Pool swimming	11	14	9	11	7
Other activity	10	9	13	11	6
Hiking	8	13	8	2	4
Biking	6	7	11	1	2
Fishing	6	10	4	*	6
Wildlife viewing or bird watching	5	8	6	2	3
Golfing	3	5	5	*	2
Lake/river swimming	3	7	2	*	*
Canoeing	2	4	2	*	*
Motor boating/water skiing	2	3	*	*	2
Downhill skiing or snowboarding	1	*	*	4	*
Hunting	1	*	4	2	1
Ice fishing	1	*	*	3	*
Off-road ATV driving	1	1	2	*	1
Cross-country skiing	*	*	*	*	*
Jet skiing	*	*	*	*	*
Snowmobiling	*	*	*	*	*
<u>Attending (checked one or more below)</u>	<u>35%</u>	<u>27%</u>	<u>46%</u>	<u>35%</u>	<u>38%</u>
Fairs or festivals	9	6	19	3	8
Amateur sporting events	8	2	8	20	6
Popular music concerts or shows	4	4	3	1	10
Theater performances	4	3	6	2	4
Professional sporting events	2	4	2	*	2
Classical music concerts	1	2	*	*	3
Other events	13	13	19	9	12
No Answer	5	6	2	3	9

* Less than 0.5%

7.3 Travel Planning Sources

Among 2007-2008 Southern Region travelers, the most frequently cited information sources used in trip planning were friends/relatives/co-workers (45%) and the Internet (40%). Fewer travelers said they used each of the other sources of trip planning information (8% or less).

Travelers in the spring season were less likely to use the Internet (33%) than those in other seasons (34-52%). Travelers in the summer and fall were more likely to have used friends/relatives/co-workers (52% and 53% respectively) as their information source as compared with travelers in the winter and spring seasons (30% and 38%).

Table 7.3:
Travel Planning Sources

	June 2007 – May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	396	151	96	95	54
	a	b	c	d	e
Friends/relatives/co-workers	45%	52%	53%	30%	38%
Internet	40	39	34	52	33
Brochure/travel guide	8	11	6	7	5
Newspaper/magazine	7	6	6	4	15
Local tourism bureau	3	3	4	1	1
TV/radio	2	3	3	*	1
Airline/travel agency	2	2	*	4	1
Visitor/welcome center	1	1	2	2	*
State Travel Office	*	*	1	*	*
Other	21	16	19	26	28

*Less than 0.5%

Note: This question not included in the 2005-2006 study.

Appendix A:

Procedures

Technical Appendix: The Research Procedures

Introduction

The basic procedure employed in this project is the T-MAP-I economic impact model. *Davidson-Peterson Associates* first employed this procedure in 1985 for the State of Georgia. Since then, it has been used to estimate traveler expenditures in states and local areas throughout the United States.

A. What is Economic Impact?

Economic impact begins when a traveler to an area spends any amount of money on any product or service in that area. The **direct** recipients of traveler expenditures use these dollars to earn income, pay wages, and pay taxes thus creating a **direct impact** on the local economy. But the benefits to the local economy extend beyond the direct impact of these dollars. Traveler expenditures create a chain effect. When businesses and their employees spend *their* income in the state, they create an **indirect impact** by supporting additional jobs, wages, salaries, proprietary income and tax revenues. The sum of the **direct** and **indirect impact** equals the total economic impact of traveler expenditures.

B. What is a Traveler?

For purposes of this study, a traveler is anyone who stays overnight one to 29 nights or who is on a day trip in an area that is at least 50 miles from their primary residence. Travelers may be motivated to travel by pleasure, personal, or business reasons or some combination of reasons. If they remain in the area for more than 30 days, they cease being a traveler. If they are staying in accommodations contracted for more than a 30-day period (construction workers or truck drivers, for example), they are not classified as travelers and the rooms they occupy are not included in those occupied by travelers.

This report and the T-MAP-I procedure are based on the premise that economic impact begins with the expenditure of dollars by travelers (bottom-up measurement) rather than receipts of selected businesses (top-down measurement) – a more traditional tool of economic analysis.

Davidson-Peterson Associates does **not** use the traditional top-down or industry receipts-based. In this study:

- Sales tax data or industry receipts are not employed;
- Measurements begin with **every dollar** travelers spend;
- North American Industry Classification System (NAICS) codes are **not** used;
- **Travelers** define where they spend money.

C. Additional Explanations

- Top-down or industry receipts-based measures assume that an industry is composed of a set of businesses that are clearly designated by customary NAICS codes. For most industries this works well. However, when applied to tourism, this method tends to underestimate the economic impact, in part because businesses are not able to separate traveler expenditures from resident expenditures.
- Tourism is not a typical industry, and cannot be represented in its entirety by a few NAICS-classified businesses. Tourism is the movement of people into an area for a brief period of time. Its economic impact begins with the sum of every dollar travelers spend on lodging, retail purchases, gas, food, entertainment or any other goods or services people buy.
- When travelers spend dollars, they spend them in many of the same “traditional industries” as local residents. While these businesses (such as retail stores, restaurants and gas stations) are identified by NAICS codes, there is simply no way to separate the purchases of travelers from those of local residents. The bottom-up procedure employed by *Davidson-Peterson Associates* is based on all traveler expenditures in all industries.

This procedure for assessing economic impact provides accurate estimates of current year figures. Methods and numbers are constantly being reviewed to improve the estimating procedures.

D. The Basic Research Steps for the 2007-2008 Southern Region Effort

What follows is a brief description of the procedures for estimating economic impact as they were completed in 2007-2008.

1. Lodging Inventory Update

At the beginning of the 2007-2008 study, Davidson-Peterson Associates received a copy of the inventory of lodging properties maintained by Explore Minnesota Tourism. This list was compared to the ending inventory from the 2005-2006 study. Any additions or deletions gathered from this comparison were incorporated into the starting inventory for the 2007-2008 study. In addition, the seasonal surveys of lodging business activity (see #2 below) allowed for further clarifications and refinements.

New properties in the updated inventory are systematically sampled so as to have representation in the overall sampling plan for each season.

2. Sampling

For each season, open properties in each of three categories (hotels/motels/B&Bs, resorts, and campgrounds) were arrayed by size and cumulative totals calculated. A random number was used to select the first property and a skip pattern developed to identify 400 properties for interviewing chosen with size taken into account. Since the seasons were sampled independently some large properties were selected more than once but all open properties had a chance of being selected each season.

3. Seasonal Survey of Paid Lodging Business Activity

Every property included in the state survey sample was contacted and asked to complete a survey questionnaire by phone. Those who did not participate by phone were asked to complete the survey via fax, email, or mail. Additional properties in counties participating in special economic impact studies are added to the state sample.

A total of 591 contacts with lodging properties in the Southern Region were made during the course of the year resulting in 434 completed surveys as follows:

Number of Interviews by Season (Southern Region)			
Season	Interview Period	# Contacted	# Completed
Summer	June - August	145	103
Fall	September - November	148	106
Winter	December - March	146	112
Spring	April - May	152	113

4. Resident (VFR) Survey

To determine the incidence of visiting friends and relatives (VFR) in the state, telephone interviews were conducted with a random sample of Minnesota households. Data from these interviews was projected to the total state household population.

A total of 1,000 VFR interviews were completed during the 2007-2008 period, with an equal proportion of interviews conducted each season.

5. Traveler Expenditure Survey/Modeling

To represent the proportion of traveler expenditures spent on specific types of goods and services, travelers were surveyed on-site while in Minnesota. The traveler expenditure ratios obtained from the on-site interviews were applied to derive the total expenditures by category. The Traveler Expenditure surveys form the basis of the Traveler Profile Survey reported elsewhere.

A total of 2,023 Traveler Expenditure questionnaires were completed during the period June 2007 through May 2008 at a variety of sites across Minnesota. Sites were chosen by selecting a county and zip code for each region based on the array of properties by size. Essentially, the counties where a sizable volume of overnight accommodations exist to serve travelers had a greater chance to be selected. Within the selected zip codes, an array of sites were chosen to maximize the ability to find a variety of tourists on site. The table below shows the total number of completed interviews by season.

Number of Interviews by Season (Statewide)

Season	Interview Period	# Completed
Summer	June – August	795
Fall	September – November	364
Winter	December – March	480
Spring	April – May	384

Roughly equal proportions of interviews were completed in each of the four Explore Minnesota Tourism regions. Of the 2,023 questionnaires, a small number were excluded from the economic impact sample due to their failure to complete all five questions necessary to include their responses in the model. The combined total of interviews from the 2005-2006 and the 2007-2008 study periods were used to calculate the expenditure ratios by spending category, which were then applied to the state and each of its four regions.

6. Economic Impact Data Calculations

Room, unit and campsite rates and occupancy were used to estimate the total expenditures at each type of accommodation. The traveler expenditure ratios were applied to this figure to derive the total traveler expenditures by those staying in each type of accommodation, in each region, and in each season.

7. Input/Output (I/O) Modeling

A special inter-industry model constructed for Minnesota utilizes the total tourism expenditures to determine the estimates of employment, income, and government revenue impacts (both direct and total) of those state tourism expenditures. Models were also developed for each of the four tourism regions. Please note that the regional impacts will not add to the state totals. Revenue leaked from one region to another is excluded from the region totals but included in the state total.

E. Limitations on Comparisons of Results between Study Periods (2005-2006 vs. 2007-2008)

Comparisons of economic impact results between the 2007-2008 study and the 2005-2006 study are limited due to the following:

1. Traveler Expenditure and Visitation Volume Estimates

The traveler expenditure and visitation volume estimates were arrived at using the data collected from the three surveys described in Section D. The basic procedures employed in calculating these volumetric estimates were the same for the two study periods.

However, during the course of the 2007-2008 period, additional data and/or new information was collected in the Seasonal Survey of Paid Lodging Business Activity that was not available when the prior study's traveler expenditure estimates were made, including:

- Changes in the lodging inventory that were unidentifiable during the prior study (such as property expansion, closed properties, increased number of rooms, etc.);
- Properties that did not participate in the previous study but have participated in the current study; or
- Properties that participated in the previous study but were able to provide more complete or more accurate information in the current study.

Reconciling these differences and revising the expenditure estimates for the 2005-2006 study was not included in the scope of the current research program. As a result, there is some degree of incongruity between the traveler expenditure and visitation volume estimates in 2007-2008 and 2005-2006.

2. Input-Output Modeling

The input-out model has been revised since the 2005-2006 study period. The model revisions encompass:

- Updates in the U.S. government data sources used to construct the model, e.g., County Business Patterns, Regional Economic Information System, State and Local Government Finance data; and
- Revisions to the modeling procedures (i.e., interactions of the impact adjustments) within the input-output model to refine and improve estimates generated.

Therefore, the model used to generate the 2007-2008 direct and total economic impact estimates is not equivalent to that used to generate the 2005-2006 estimates and comparisons of results should not be made.

3. Lodging Inventory Classification

In the 2007-2008 study, Explore Minnesota Tourism undertook a review of indoor lodging properties in our lodging database with regard to their property type classification, i.e., hotels/motels/B&Bs, resorts, and campgrounds. This resulted in approximately 70 properties that were re-classified from the “hotels/motels/B&Bs” category to the “resorts” category. Therefore, the data presented **by accommodation type** in this report is not comparable to what was reported in the 2005-2006 annual report.

4. Seasonal Definitions

The definitions for the winter and spring seasons, i.e., the months included in each season, differ from the 2005-2006 study to the 2007-2008 study. In the 2007-2008 study, winter included December, January, February, and March (4 months) and spring included April and May (2 months). In the 2005-2006 study, winter included December, January, and February (3 months) and spring included March, April, and May (3 months). Therefore, the data presented **by season** in this report is not comparable to what was reported in the 2005-2006 annual report.

A summary of the key estimates from the 2005-2006 economic impact study is included in Appendix B, Table B-5 for reference only.

F. Additional Procedures for the Traveler Profile Study

Davidson-Peterson Associates used a stratified cluster sampling technique in an effort to represent all types of travelers across the four Minnesota regions. The technique allowed us to select systematically the geographic locations (i.e., zip codes) within each region that would form the sampling frame. Minimum quotas were established in total and by region to ensure that an adequate number of interviews were completed for the season.

To provide more robust sample sizes and include interviews at a broader selection of traveler sites, survey responses from the 2007-2008 study have been combined with those from the 2005-2006 study. The table below shows the total number of completed interviews among travelers **statewide** by year and season.

Number of Minnesota Traveler Interviews

Season	Interview Period	2007-2008	2005-2006	Total Interviews
Summer	June – August	795	869	1,664
Fall	September – November	364	449	813
Winter	December – March	480	580	1,060
Spring	April – May	384	394	886
Total	June - May	2,023	2,292	4,315

In total, 1,098 usable questionnaires were collected from travelers in the **Southern Region** of Minnesota and returned to Davidson-Peterson Associates. Some 558 were conducted in June 2007 through May 2008 and 540 in June 2005 through May 2006.

To reflect seasonal and regional visitation patterns more accurately, Davidson-Peterson Associates balanced the sample of travelers from the Traveler Expenditure Survey according to the person-visit estimates from the economic impact portion of the research study (using the proportion of person-visits by season and region). With this modest weighting, the annual traveler profile study results are based on a sample of travelers in Minnesota which is balanced so as to be directly proportional to the estimated number of travelers by region and season.

The table on the following page shows the distribution across season and region for the following:

- The estimated proportion of person-visits in each season by region;
- The number of interviews completed in each season by region;
- The weights applied to the interviews to balance the sample to the desired number of interviews in each season by region; and
- The number of interviews in the balanced sample so that the proportion matches the person-visits proportion in each season by region.

**Sample Balancing by
Estimated Proportion of Person-Visits**

June 2007 through May 2008

	Proportion of Person-Visits	Actual Completes	Weights Applied	Balanced Completes
<u>June – August 2007</u>	<u>37.2%</u>	<u>795</u>		<u>751</u>
Metro	15.5%	216	1.449	313
Northcentral/West	8.1%	167	0.976	163
Southern	7.5%	229	0.660	151
Northeast	6.1%	183	0.676	124
 <u>September - November 2007</u>	 <u>24.2%</u>	 <u>364</u>		 <u>490</u>
Metro	11.5%	102	2.290	234
Northcentral/West	4.4%	67	1.323	89
Southern	4.7%	113	0.846	96
Northeast	3.6%	82	0.883	72
 <u>December 2007 - March 2008</u>	 <u>24.0%</u>	 <u>480</u>		 <u>486</u>
Metro	11.8%	137	1.747	239
Northcentral/West	4.7%	98	0.962	94
Southern	4.7%	122	0.780	95
Northeast	2.8%	123	0.464	57
 <u>April - May 2008</u>	 <u>14.6%</u>	 <u>384</u>		 <u>296</u>
Metro	6.9%	103	1.354	139
Northcentral/West	2.8%	100	0.574	57
Southern	2.7%	94	0.571	54
Northeast	2.3%	87	0.522	45
 <u>Total</u>	 <u>100.0%</u>	 <u>2,023</u>		 <u>2,023</u>
Metro	45.7%	558		925
Northcentral/West	19.9%	432		403
Southern	19.6%	558		396
Northeast	14.8%	475		299

Appendix B:
Economic Impact - Supporting Tables

Table B-1

**Estimated Traveler Expenditures
By Category of Expenditure and
Accommodation Used
June 2007 through May 2008
(\$ Millions)**

	Paid Accommodations			No Lodging Expense		TOTAL
	Hotels/ Motels/ B&Bs	Resorts	Camp- grounds	Visiting Friends/ Relatives	Day Tripper	
Food	\$236.54	\$5.37	\$42.62	\$208.15	\$14.03	\$506.71
<u>Shopping</u>	<u>\$259.36</u>	<u>\$3.18</u>	<u>\$68.52</u>	<u>\$204.38</u>	<u>\$14.92</u>	<u>\$550.35</u>
General	145.91	1.25	38.05	136.14	7.71	329.05
Traveler	113.45	1.93	30.46	68.24	7.21	221.30
<u>Recreation</u>	<u>\$221.11</u>	<u>\$4.33</u>	<u>\$55.34</u>	<u>\$228.09</u>	<u>\$19.57</u>	<u>\$528.43</u>
Liquor	39.74	1.62	16.00	65.12	1.62	124.10
Historic	8.25	0.06	3.20	6.52	0.63	18.66
Sightseeing	19.93	0.18	2.26	9.52	0.70	32.59
Event fees	32.03	0.15	8.17	27.09	3.52	70.96
Sport fees	25.50	0.76	4.84	27.79	3.25	62.14
Cultural event fees	4.39	0.04	0.09	9.71	0.72	14.95
Evening entertainment	24.75	0.29	4.17	37.16	0.64	67.00
Licenses	7.93	0.63	5.37	9.83	0.51	24.28
Sweepstakes	4.93	0.09	0.69	6.64	0.48	12.83
Wagering	53.14	0.45	9.74	25.22	7.40	95.95
Sport Fees	25.50	.76	4.84	27.79	3.25	62.14
Other	0.54	0.04	0.82	3.49	0.10	4.98
Lodging	\$251.11	\$5.77	\$17.00	--	--	\$273.87
Ground Transportation	\$103.16	\$2.76	\$38.41	\$96.56	\$6.25	\$247.14
Total	\$1,071.27	\$21.40	\$221.88	\$737.18	\$54.77	\$2,106.50

Note: Columns of figures may not add to totals shown due to rounding.

Table B-2

**Estimated Traveler Expenditures
By Season
June 2007 through May 2008
(\$ Millions)**

	June- August 2007	September- November 2007	December 2007- March 2008	April- May 2008	TOTAL
Food	\$186.30	\$132.67	\$114.01	\$73.74	\$506.72
<u>Shopping</u>	<u>\$207.92</u>	<u>\$142.75</u>	<u>\$119.79</u>	<u>\$79.88</u>	<u>\$550.35</u>
General	123.87	85.66	71.82	47.70	329.05
Traveler	84.05	57.09	47.97	32.19	221.30
<u>Recreation</u>	<u>\$199.02</u>	<u>\$137.54</u>	<u>\$115.18</u>	<u>\$76.68</u>	<u>\$528.43</u>
Liquor	48.55	32.07	25.69	17.79	124.10
Historic	7.34	4.77	3.84	2.70	18.66
Sightseeing	11.49	8.58	7.71	4.81	32.59
Event fees	26.67	18.45	15.51	10.33	70.96
Sport fees	22.93	16.31	13.93	8.97	62.14
Cultural event fees	5.27	4.02	3.51	2.15	14.95
Evening entertainment	24.51	17.72	15.07	9.70	67.00
Licenses	10.30	6.04	4.45	3.50	24.28
Sweepstakes	4.72	3.36	2.84	1.90	12.83
Wagering	35.10	24.99	21.77	14.09	95.95
Other	2.12	1.25	0.88	0.74	4.98
Lodging	\$92.12	\$71.53	\$68.68	\$41.54	\$273.87
Ground Transportation	\$96.97	\$63.34	\$51.14	\$35.69	\$247.14
Total	\$782.33	\$547.83	\$468.81	\$307.53	\$2,106.50

Note: Columns of figures may not add to totals shown due to rounding.

Seasonal Analysis

	June- August 2007	September- November 2007	December 2007- March 2008	April- May 2008
Share of seasonal expenditures	37%	26%	22%	15%
Share of days in year	25%	25%	33%	17%
Ratio	1.50	1.04	0.66	0.87

Table B-3

**Estimated Traveler Expenditures
Average per Person per Day**

**June 2005 through May 2006 and
June 2007 through May 2008 Combined**

	Average Expenditures per Person per Day
Total - All Travelers	\$113.92
Travelers with Paid Accommodations	
Hotels/Motels/B&Bs	\$131.18
Resorts	N/A
Campgrounds	\$85.58
Travelers with No Lodging Expenses	
Visiting Friends/Relatives (or other unpaid lodging)	\$99.10
Day Trippers	\$36.09

Note: Estimated average expenditures per person per day are calculated from data collected among travelers surveyed on-site while on their Minnesota trip. Interview responses from the 2007-2008 study have been combined with those from the 2005-2006 study to generate these averages.

N/A = Insufficient number of responses within this category to report estimates.

Table B-4

**Estimated Impact of Traveler Expenditures
on the Economy of the Southern Region
June 2007 through May 2008**

	June 2007-May 2008	
	Direct Impact	Total Impact
Employment (full-time job equivalents)	33,800	46,400
Resident Income (wages, salaries, and proprietary income)	\$570,200,000	\$943,000,000
Government Revenues:		
State government revenues	\$167,600,000	\$252,300,000
Local government revenues	\$48,000,000	\$76,500,000

Table B-5

Summary of Economic Impact Estimates
Previous Study:
June 2005 through May 2006

FOR REFERENCE ONLY*

	June 2005-May 2006
Estimated Traveler Expenditures (\$ in Millions)	
Total	\$1,900.33
Travelers with Paid Accommodations	
Hotels/Motels/B&Bs	\$940.01
Resorts	\$24.81
Campgrounds	\$230.86
Travelers with No Lodging Expenses	
Visiting Friends/Relatives	\$655.23
Day Trippers	\$49.41
Estimated Travel Volume: Person-Visits (in Millions)	
Total	7.66
Travelers with Paid Accommodations:	
Hotels/Motels/B&Bs	2.21
Resorts	0.04
Campgrounds	1.28
Travelers with No Lodging Expenses	
Visiting Friends/Relatives	2.31
Day Trippers	1.83

* See Appendix A, Section E for details regarding limitations on comparisons of results between study periods (2005-2006 vs. 2007-2008).

Note: Columns of figures may not add to totals shown due to rounding.

Note: A person-visit is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Minnesota travels to many locations in Minnesota, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 7.663 million person-visits should not necessarily be interpreted as 7.663 million travelers.

Table B-5 (Cont'd)

Summary of Economic Impact Estimates

**Previous Study:
June 2005 through May 2006**

FOR REFERENCE ONLY*

	June 2005-May 2006	
	Direct Impact	Total Impact
Employment (full-time job equivalents)	33,400	45,800
Resident Income (wages, salaries, and proprietary income)	\$543,600,000	\$865,600,000
Government Revenues:		
State government revenues	\$154,600,000	\$230,800,000
Local government revenues	\$48,600,000	\$73,800,000

* See Appendix A, Section E for details regarding limitations on comparisons of results between study periods (2005-2006 vs. 2007-2008).

**Appendix C:
Traveler Profile-
Tables of Significant Differences**

STATISTICAL DIFFERENCES

The Profile of Southern Region Travelers

When appropriate, significant differences at the 95% confidence level are noted in the findings. Tests of significance are statistical methods for measuring the likelihood that observed relationships in a sample are the result of real differences between the groups and not sampling error. Thus, when we state that two numbers are statistically different at the 95% confidence level, we are saying that if we were to sample the universe 100 times, at least 95 times out of 100 the samples observed would be different. In contrast, fewer than five times out of 100 there would not be any difference between the observed numbers.

The following is an example of how these tables can be interpreted and used. The proportion of respondents residing in Minnesota during the summer (52%) and fall (57%) seasons was significantly higher than the proportion of respondents residing in Minnesota during the winter (34%) and spring (43%) seasons.

Table C-1
Demographic and Socioeconomic Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	Base:	June-May Total 823	June- August (Summer) 326	September - November (Fall) 192	December- March (Winter) 186	April- May (Spring) 119
		a	b	c	d	e
Average Age		47.3	47.4	45.3	47.8	49.6c
Gender:						
Female		51%	57%de	57%de	40%	47%
Male		45	40	39	57bc	50bc
Racial/Ethnic Background:						
Black		1%	2%d	2%	*	1%
No Answer		2	3e	2	2	1
Residence:						
Minnesota		47%	52%de	57%de	34%	43%
Iowa		10	10c	5	11	12c
Wisconsin		8	9e	10e	8	5
Illinois		3	2	6b	2	3
Other state		11	9	7	16bc	17bc
State not specified		8	5	8	14b	8
Residence by DMA:						
Minneapolis-St. Paul		37%	43%de	43d%	21%	34%d
Des Moines-Ames		3	4c	*	3c	7c
La Crosse-Eau Claire		3	3	4e	3	1
Other DMA's		27	25	20	37bc	28
No answer		10	7	10	16b	12b

* Less than 0.5%

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Note: States with responses less than 2% among the total sample have been aggregated into the "Other state" category. DMAs with responses less than 2% among the total sample have been aggregated into the "Other DMAs" category.

Table C-2
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	823	326	192	186	119
	a	b	c	d	e
Trip Purpose (multi-response):					
Vacation or short pleasure trip	45%	62% cde	46% de	28%	25%
Personal (wedding, funeral, medical, etc.)	32	29	28	41 bc	35
Business or work	15	5	17 b	22 b	29 bc
Convention or conference	10	7	13 b	10	15 b
No Answer	1	1	2	*	*
Average Travel Party Size	2.6	2.8e	2.6	2.6	2.4
Average Nights (Excluding Daytrippers)	3.2	3.1 c	2.6	3.7 c	3.7 c
Children in Travel Party					
One or more children under 18 years old	26%	33% ce	17%	28% ce	18%
No children	74	67	83 bd	72	82 bd
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	90%	86%	92% b	90%	93% b
One or more	10	14 ce	8	10	7
<i>6 to 11 years old</i>					
None	86%	81%	91% b	88% b	88% b
One or more	14	19 cde	9	12	12
<i>12 to 17 years old</i>					
None	89%	86%	94% bd	86%	93% bd
One or more	11	14 ce	6	14 ce	7

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Table C-2 (cont'd)
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total 823	June- August (Summer) 326	September - November (Fall) 192	December- March (Winter) 186	April- May (Spring) 119
	a	b	c	d	e
Minnesota Trips in Last 5 Years					
None	16%	14%	11%	22%bc	22%bc
1 trip	7	10c	5	7	7
5 to 10 trips	23	19	31bde	22	21
No Answer	2	3cde	1	*	1
Lodging:					
<u>Paid Accommodations</u>	<u>70%</u>	<u>64%</u>	<u>66%</u>	<u>79%bc</u>	<u>75%b</u>
Hotel/Motel/Historic Inn	59	44	59b	78bc	71bc
In an RV at a campground	6	13ce	2	*	3
In a tent at a campground	3	7ce	*	*	*
Resort	1	*	3bd	*	1
<u>Unpaid Accommodations</u>	<u>13%</u>	<u>13%d</u>	<u>23%bde</u>	<u>5%</u>	<u>11%d</u>
Home of family or friends	12	12d	21bde	5	10
<u>Day tripper</u>	<u>17%</u>	<u>23%ce</u>	<u>11%</u>	<u>16%</u>	<u>14%</u>

Table C-2 (cont'd)
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total 823	June- August (Summer) 326	September - November (Fall) 192	December- March (Winter) 186	April- May (Spring) 119
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Activities:

General (checked one or more)

Dining out	69%	61%	68%	81%bc	72%b
Sightseeing or driving for pleasure	22	29cd	16	15	22
Taking in city sites	14	16d	17d	8	18d
Driving on designated scenic byways	12	15d	14d	4	11d
Nightlife or evening entertainment	11	7	21bde	8	10
Casino gaming	8	14cde	3	4	8c
Viewing fall colors	6	2	20b	*	*

Shopping (checked one or more below)

General/ mall shopping	46%	41%	51%b	51%b	46%
Arts, crafts, or antiques	23	22	27e	27e	15
At the Mall of America	14	11d	25bde	6	17d
	7	4	12b	7	8

Attending (checked one or more below)

Fairs or festivals	35%	27%	46%bd	35%	38%b
Amateur sporting events	9	6	19bde	3	8
Popular music concerts or shows	8	2	8b	20bce	6b
Theater performances	4	4d	3	1	10bcd
Professional sporting events	4	3	6b	2	4
Classical music concerts	2	4d	2	*	2
Other events	1	2cd	*	*	3d
	13	13	19de	9	12

* Less than 0.5%

Table C-2 (cont'd)
Travel Party and Trip Profile
Statistical Differences by Season

2005-2006 and 2007-2008 Combined

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base	823	326	192	186	119
	a	b	c	d	e
<u>Visiting (checked one or more below)</u>	<u>49%</u>	<u>54%de</u>	<u>55%de</u>	<u>40%</u>	<u>38%</u>
Friends or relatives	27	27de	39bde	19	19
Historic sites	13	16d	16d	5	11
State or national parks	10	13 de	14 de	2	4
Other museums	9	10de	14de	4	4
Art museums	7	6	15bde	4	5
Amusement parks or carnivals	5	5de	13bde	1	1
Indian areas	5	6d	11bde	1	3
Indoor water parks	4	3	10bde	4	1
Other attraction	9	6	16bde	9	7
<u>Participating In (checked one or more below)</u>	<u>37%</u>	<u>40%de</u>	<u>46%de</u>	<u>31%</u>	<u>23%</u>
Pool swimming	11	14e	9	11	7
Hiking	8	13cde	8d	2	4
Biking	6	7de	11de	1	2
Fishing	6	10ce	4	*	6
Wildlife viewing or bird watching	5	8de	6	2	3
Lake/river swimming	3	7c	2	*	*
Motor boating/water skiing	2	3c	*	*	2
Downhill skiing or snowboarding	1	*	*	4ce	*
Hunting	1	*	4e	2	1
Other activity	10	9	13e	11	6
No Answer	5	6c	2	3	9cd

* Less than 0.5%

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Table C-3:
Travel Planning Sources

2007-2008 Only

	June 2007 – May 2008	June-August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	396	151	96	95	54
	a	b	c	d	e
Friends/relatives/co-workers	45%	52% de	53% de	30%	38%
Internet	40	39	34	52 bce	33
Newspaper/magazine	7	6	6	4	15 bcd
Other	21	16	19	26 b	28 b

*Less than 0.5%

Note: This question not included in the 2005-2006 study.

**Appendix D:
Traveler Profile -
Tables of 2007-2008 Only Results**

TABLES OF 2007-2008 ONLY RESULTS

The Following section includes the Traveler Profile Study results from the data collected during June 2007 through May 2008.

Table D-1
Travel Party and Trip Profile

2007-2008 Only

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	396	151	96	95	54
Age:					
18 to 24	8%	9%	13%	6%	1%
25 to 29	7	7	11	7	2
30 to 39	17	17	15	22	12
40 to 49	22	24	19	25	18
50 to 59	20	18	17	20	27
60 to 64	10	7	12	10	13
65 and older	15	15	13	9	26
No Answer	1	3	*	*	2
Average Age	47.6	47.2	45.7	46.1	54.6
Income:					
Less than \$25,000	7%	7%	10%	6%	9%
\$25,000 to \$34,999	8	9	7	8	9
\$35,000 to \$49,999	13	15	14	11	12
\$50,000 to 74,999	19	19	20	16	22
\$75,000 to \$99,999	17	15	17	25	11
\$100,000 to \$124,999	11	10	7	14	14
\$125,000 to \$149,999	4	4	6	2	3
\$150,000 or more	7	7	4	11	5
No Answer	13	14	14	7	16
Estimated Median Income	\$69,300	\$67,400	\$64,500	\$80,400	\$63,500
Gender:					
Male	40%	32%	41%	50%	45%
Female	55	63	53	45	52
No Answer	5	5	6	5	3
Racial/Ethnic Background:					
White	95%	96%	93%	96%	97%
American Indian	1	1	2	*	*
Asian	1	*	2	2	1
Black	1	2	1	*	1
Hispanic	1	*	2	1	1
Other	1	1	1	1	*
No Answer	2	2	3	1	*

Less than 0.5%

Table D-1 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	396	151	96	95	54
Residence:					
<u>United States</u>	<u>99%</u>	<u>99%</u>	<u>99%</u>	<u>99%</u>	<u>100%</u>
Minnesota	55	58	62	42	61
Iowa	8	8	3	11	11
Wisconsin	8	7	11	9	4
South Dakota	3	5	3	2	1
Illinois	3	1	7	3	1
North Dakota	2	1	2	2	2
Michigan	2	2	*	5	1
Other state	14	14	8	22	13
State not specified	4	4	4	3	6
Canada	*	*	1	*	*
Another Country	*	*	*	1	*
Residence by DMA:					
Minneapolis – St. Paul	43	48	52	28	38
Rochester –Mason City					
-Austin	7	4	4	11	14
Sioux Falls (Mitchell)	4	6	4	2	3
Mankato	4	3	4	3	7
Des Moines -Ames	3	4	*	3	7
La Crosse – Eau Claire	4	5	4	2	2
Duluth-Superior	2	3	3	1	1
Peoria-Bloomington	2	*	6	1	*
Fargo-Valley City	2	*	2	3	2
Other DMA's	24	22	15	42	18
No answer	5	5	5	4	6

*Less than 0.5%

Table D-2
Travel Party and Trip Profile

2007-2008 Only

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	396	151	96	95	54
Trip Purpose (multi-response):					
Vacation or short pleasure trip	49%	66%	44%	31%	41%
Personal (wedding, funeral, medical, etc.)	32	32	27	47	17
Business or work	12	3	16	12	27
Convention or conference	11	6	19	9	15
No Answer	1	1	1	1	*
Travel Party Size:					
1 person	14%	10%	17%	13%	20%
2 people	48	42	56	50	45
3 to 4 people	26	31	16	25	31c
5 or more people	13	17	12	12	4
Average Travel Party Size	2.6	2.9	2.4	2.6	2.4
Total Trip Length of Stay:					
Daytripper	17%	18%	4%	20%	32%
1 night	22	20	22	22	28
2 nights	30	25	50	22	22
3 to 6 nights	22	24	20	25	15
7 or more nights	9	14	3	11	3
Average Nights (Excluding Daytrippers)	3.1	3.6	2.3	3.5	2.5
Children in Travel Party					
One or more children under 18 years old	25%	36%	10%	30%	11%
No children	75	64	90	70	89
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	88%	79%	95%	89%	96%
One or more	12	21	5	11	4
<i>6 to 11 years old</i>					
None	86%	80%	94%	84%	93%
One or more	14	20	6	16	7
<i>12 to 17 years old</i>					
None	90%	86%	97%	88%	96%
One or more	10	14	3	12	4

Table D-2 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	396	151	96	95	54
Minnesota Trips in Last 5 Years					
None	15%	14%	12%	25%	9%
1 trip	6	7	5	4	6
2 to 4	21	21	19	20	27
5 to 10 trips	25	22	35	20	26
More than 10	32	34	27	31	33
No answer	1	2	2	*	*
Estimated Median Number of Trips	6.5	6.7	6.8	5.4	6.8
Lodging:					
<u>Paid Accommodations</u>	<u>69%</u>	<u>67%</u>	<u>78%</u>	<u>72%</u>	<u>49%</u>
Hotel/Motel/Historic Inn	54	34	74	70	43
In an RV at a campground	10	24	2	*	4
In a tent at a campground	3	9	*	*	1
At a bed and breakfast	1	*	*	2	1
At a resort (cabin/other indoor unit)	1	*	2	*	*
At a vacation home/ condo/ cabin/ houseboat you rented	*	*	*	*	*
<u>Unpaid Accommodations</u>	<u>14%</u>	<u>14%</u>	<u>18%</u>	<u>7%</u>	<u>19%</u>
Home of family or friends	13	14	17	7	17
At a campground with no fee	*	*	*	*	2
At your vacation home/condo/cabin/ houseboat	*	*	1	*	*
Of a family/friend					
At vacation home/condo/cabin/houseboat	*	*	*	*	*
<u>Day tripper</u>	<u>17%</u>	<u>18%</u>	<u>4%</u>	<u>20%</u>	<u>32%</u>

* Less than 0.5%.

Table D-2 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June-May Total 396	June- August (Summer) 151	September - November (Fall) 96	December- March (Winter) 95	April- May (Spring) 54
Activities:					
General (checked one or more below)	<u>82%</u>	<u>79%</u>	<u>82%</u>	<u>85%</u>	<u>83%</u>
Dining out	71	63	71	82	72
Sightseeing or driving for pleasure	22	25	19	16	26
Nightlife or evening entertainment	14	10	24	11	12
Driving on designated scenic byways	12	14	15	5	11
Taking in city lights	12	14	12	8	11
Casino gaming	6	12	2	*	3
Viewing fall colors	6	3	22	*	*
<u>Shopping (checked one or more below)</u>	<u>52%</u>	<u>46%</u>	<u>58%</u>	<u>54%</u>	<u>53%</u>
General or mall shopping	26	22	35	29	16
For gifts or souvenirs	24	23	29	23	19
Arts, crafts, or antiques	18	13	35	7	23
Outlet shopping	13	13	19	11	6
At the Mall of America	10	8	19	7	3
<u>Visiting (checked one or more below)</u>	<u>58%</u>	<u>64%</u>	<u>63%</u>	<u>46%</u>	<u>50%</u>
Friends or relatives	29	31	44	15	22
Historic sites	15	13	24	10	12
Other museums	11	7	26	7	4
Art museums	10	7	27	3	4
State or national parks	10	9	23	2	6
Amusement parks or carnivals	8	6	22	2	2
Outdoor water parks	8	8	19	*	*
Indian areas	7	3	21	1	1
Indoor water parks	6	3	18	4	*
Other attraction	18	12	33	16	15

* Less than 0.5%.

Table D-2 (cont'd)
Travel Party and Trip Profile

2007-2008 Only

	June-May Total Base: 396	June- August (Summer) 151	September - November (Fall) 96	December- March (Winter) 95	April - May (Spring) 54
<u>Participating In (checked one or more below)</u>	<u>45%</u>	<u>57%</u>	<u>47%</u>	<u>34%</u>	<u>28%</u>
Pool swimming	14	24	9	10	4
Hiking	8	13	9	2	5
Fishing	7	14	2	*	6
Biking	5	11	2	2	2
Wildlife viewing or bird watching	5	5	8	1	5
Golfing	4	7	5	*	2
Lake/river swimming	4	8	2	*	*
Canoeing	2	3	1	*	*
Hunting	2	*	5	1	2
Off-road ATV driving	2	1	4	1	*
Downhill skiing or snowboarding	1	*	*	2	1
Ice Fishing	1	*	*	4	1
Motor boating/water skiing	1	3	*	*	2
Cross-Country Skiing	*	*	*	*	1
Jet Skiing	*	*	*	*	*
Snowmobiling	*	*	*	*	*
Other Activity	19	17	23	20	14
<u>Attending (checked one or more below)</u>	<u>44%</u>	<u>32%</u>	<u>55%</u>	<u>47%</u>	<u>53%</u>
Other events	20	16	34	13	21
Fairs or festivals	12	9	21	5	14
Amateur sporting events	8	3	3	26	*
Popular music concerts or shows	5	7	-	1	18
Theater performances	4	3	5	2	7
Classical music concerts	1	2	*	*	3
Professional sporting events	1	1	1	1	2

*Less than 0.5%

**Table D-3:
Travel Planning Sources**

2007-2008 Only

	June 2007 – May 2008	June-August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	396	151	96	95	54
Friends/relatives/co-workers	45%	52%	53%	30%	38%
Internet	40	39	34	52	33
Brochure/travel guide	8	11	6	7	5
Newspaper/magazine	7	6	6	4	15
Local tourism bureau	3	3	4	1	1
TV/radio	2	3	3	*	1
Airline/travel agency	2	2	*	4	1
Visitor/welcome center	1	1	2	2	*
State Travel Office	*	*	1	*	*
Other	21	16	19	26	28

*Less than 0.5%

Note: This question not included in the 2005-2006 study.

Appendix E:
Minnesota Tourism Regions

MINNESOTA TOURISM REGIONS

COUNTIES WITHIN MINNESOTA'S TOURISM REGIONS

<u>Twin Cities Metro</u>	<u>Northeast</u>	<u>Northcentral/West</u>	<u>Southern</u>
Anoka	Aitkin	Becker	Big Stone
Carver	Carlton	Beltrami	Blue Earth
Chisago	Cook	Benton	Brown
Dakota	Isanti	Cass	Chippewa
Hennepin	Itasca	Clay	Cottonwood
Ramsey	Kanabec	Clearwater	Dodge
Scott	Koochiching	Crow Wing	Faribault
Washington	Lake	Douglas	Fillmore
Wright	Pine	Grant	Freeborn
	St. Louis	Hubbard	Goodhue
		Kittson	Houston
		Lake of Woods	Jackson
		Mahnomen	Kandiyohi
		Marshall	Lac qui Parle
		Mille Lacs	Le Sueur
		Morrison	Lincoln
		Norman	Lyon
		Otter Tail	McLeod
		Pennington	Martin
		Polk	Meeker
		Pope	Mower
		Red Lake	Murray
		Roseau	Nicollet
		Sherburne	Nobles
		Stearns	Olmsted
		Stevens	Pipestone
		Todd	Redwood
		Wadena	Renville
		Wilkin	Rice
			Rock
			Sibley
			Steele
			Swift
			Traverse
			Wabasha
			Waseca
			Watonwan
			Winona
			Yellow Medicine

Appendix F:

Survey Instruments

Minnesota 2007/2008 Lodging Managers Survey – Wave 1 (June –August 2007)

Date: _____ Date: _____ Date: _____ Date: _____ Date: _____ Date: _____
 Time: _____ Time: _____ Time: _____ Time: _____ Time: _____ Time: _____
 Status: _____ Status: _____ Status: _____ Status: _____ Status: _____ Status: _____
 Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____

Interviewer: Verify basic information with the person who answers the phone.

Phone Number: «phone» Alternate: «altphone» Contact Name: «manager» Title: «title» Property Name: «name» Fax Number: «fax» Physical Address: «add1» «add2» «city», MN «zip» Mailing Address: «madd1» «madd2» «mcity», «mstate» «mzip» Rooms: «size» («ptype»)	All information correct <input type="checkbox"/>
--	--

Interviewer: Ask to speak with «manager». If not available after multiple attempts, interview an alternate executive and record name/title below.

Contact Name: _____ Title: _____

- Is your property open only to members of special groups (club members, boy/girl scouts, church groups, etc.)? Yes ☐ -- Terminate No ☐ -- Continue
- Is your property available only for permanent or semi-permanent rentals (bookings of more than thirty days at a time)? Yes ☐ -- Terminate No ☐ -- Continue
- Is your property open all year? Yes ☐ -- Go to Q4 No ☐ -- Go to Q3A

3A. *If No* – When does your property open for the season? _____ «season_open»

When does your property close for the season? _____ «season_close»

For each month open -- How many nights is your property open for that month?

Jan	«jan»		Feb	«feb»		Mar	«mar»		Apr	«apr»		May	«may»		Jun	«jun»	
Jul	«jul»		Aug	«aug»		Sep	«sep»		Oct	«oct»		Nov	«nov»		Dec	«dec»	

No nights for **June through August** ☐ -- Terminate for this quarter.

- For the purpose of this study, please think of long term rentals as 30 nights or more. Of the rooms you have for rent, were any committed to long-term rentals, or were any otherwise not available for rental for the period **June 1, 2007 to August 31, 2007**?

Yes ☐ -- Go to Q4A No ☐ -- Go to Q5

- If Yes* -- As I read each month, please tell me how many of your total rooms were available to transient guests staying for less than 30 nights.

Jun		Jul		Aug	
-----	--	-----	--	-----	--

- What was your **average percent occupancy rate** for each of the following months?

Jun	%
Jul	%
Aug	%

(If not able to provide occupancy by month

OR **Seasonal Average** _____ %

Don't know/ ☐ -- Go to Q6
 unavailable

DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qr1»	Q2: «qr2»	Q3: «qr3»	Q4: «qr4»	Status: «status»
--------------	--------------	------------------	-----------	-----------	-----------	-----------	------------------

Minnesota 2007/2008 Lodging Managers Survey – Wave 1 (June –August 2007)

6. What was your **average daily unit rate** for each of the following months?

*Interviewer: If the lodging manager is unable to provide the average daily rates please use the space provided in the column "other details" to record specific unit rate information for each month. (For example, number of **rooms** at each of several different rates, weekend vs. weekday rates, etc.)*

	ADR	Other Details
Jun	\$	
Jul	\$	
Aug	\$	

Only use if the manager is not able to provide ADR by month.

Seasonal ADR	
--------------	--

Office Use Only: Estimated ADR: June	July	August
Estimated Seasonal ADR: _____		

For the next few questions, please think only of guests who are staying for less than 30 nights.

7. On average, how many nights did a typical guest stay in your property between **June 1, 2007 and August 31, 2007**?

Average # of nights	
---------------------	--

8. What was the average number of guests staying in one room during the **June 1, 2007 to August 31, 2007** time period?

Average Party Size	
--------------------	--

9. During the period **June 1, 2007 to August 31, 2007**, what percentage of your room-nights were rented to guests traveling for...

Pleasure/Personal:	%
Business:	%
Meetings/conventions:	%

10. Between **June 1, 2007 and August 31, 2007**, what percentage of your guests were from...

Minnesota	%
Other US locations	%
Canada	%
Other international locations	%

Comments:

DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qt r1»	Q2: «q tr2»	Status: «status»	Q3: «qt r3»	Q4: «qt r4»
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Quarterly Resident Survey -- Minnesota Tourism Study

Speak to Head of Household:

Hello, I'm _____ from *Davidson-Peterson Associates*, a marketing research firm specializing in Travel & Tourism. We are talking to people in your area to learn more about vacation trips associated with visiting friends and family for Explore Minnesota and the State of Minnesota.

May I speak with the male or female head of household?

(IF TRANSFERRED TO ANOTHER ADULT, REPEAT INTRODUCTION. IF CONTINUING WITH THE SAME INDIVIDUAL WHO ANSWERED THE TELEPHONE, CONTINUE BELOW.)

May I ask you a few quick questions? This is not a sales call and your individual responses will remain strictly confidential. It should take only 3 or 4 minutes of your time.

First, is this your primary residence, meaning you spend a majority of your time living at this address?

- ☐ Yes (CONTINUE SURVEY)
- ☐ No (TERMINATE)

Are you eighteen years or older?

- ☐ Yes (CONTINUE SURVEY)
- ☐ No (TERMINATE)

1. Now, by visiting friends and relatives, we mean those people whose visit is considered non-routine -- please do not include routine visits by the same people, such as college students home for vacation. We're interested in those people who are on a vacation or non-routine trip.

Over the 3 month period of June 2007 through August 2007, on how many occasions did you have friends or relatives stay overnight in your home for at least one night on non-routine visits?

Number of occasions: _____

None ☐

Skip to Q.5

For Each Occasion:

2. Think about the **last** time you had friends or relatives visit. In what month was that?
(Record Below)

3. How many people stayed with you on that occasion? **(Record Below)**

4. And, how many nights did they stay with you? **(Record Below)**

Repeat For Each Occasion (Transition: And, how about the time before that?)

Start With Last/Most Recent Occasion:

	Q.2 Month	Q3. # of People	Q4. # of Nights
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 5.

Average # of people:_____ Average # of nights:_____

Second Home Section

5. Do you own a second home used for recreational purposes somewhere else in Minnesota?

Yes [☐]

No [☐]

Skip to Q.13

6. In which county is your **second** home located? _____

7. Over the 3 month period of June 2007 through August 2007, on how many occasions did you visit your second home for at least one night?

Number of occasions: _____ None [] **Skip to Q.13**

For Each Occasion:

8. Think about the **last** time you visited your second home. In what month was that? **(Record Below)**

9. Including yourself, how many people in your immediate family visited on that occasion? **(Record Below)**

10. And, how many nights did you stay? **(Record Below)**

11. How many people **other than your immediate family** stayed with you on that occasion? **(Record Below)**

12. And, how many nights did they stay with you? **(Record Below)**

Repeat For Each Occasion (Transition: And, how about the time before that?)

Start With Last/Most Recent Occasion:

	Q.8 Month	Q.9 # of Family Members	Q.10 # of Nights	Q.11 # of Guests	Q.12 # of Nights
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 12.

Average # of **Family**: _____ Average # of **Guests**: _____

Average # of Nights: _____ Average # of Nights: _____

13. In total, including yourself, how many people live in your household?

of people: _____

14. What is the ZIP code of your home address?

15. In which county is your home located? _____

Respondent Name: _____

Record Gender: Male []-1 Female []-2

Phone number: _____

Thanks for taking the time to complete this survey. Your information is greatly appreciated. For verification purposes, you might be contacted in the future to go over the information you provided today. Once again, thanks.



DPA Use Only

Dear Traveler:

Your visit to our area is very important to us. Please take a few moments to answer the following questions and return this questionnaire to the person who gave it to you. Your responses are very important. Please make your marks **INSIDE** the boxes or circles. Thank you very much.

1. What is your reason or reasons for visiting this area? *(Please mark all that apply.)*

- ☐ ₁ Vacation/short pleasure trip
- ☐ ₃ Convention/conference
- ☐ ₂ Personal (wedding, funeral, medical, etc.)
- ☐ ₄ Business/work

2. What source(s) of information did you use in planning your trip? *(Please mark all that apply.)*

- ☐ ₁ Internet
- ☐ ₄ Brochure/travel guide
- ☐ ₇ Friends/relatives/co-workers
- ☐ ₁₀ Other (specify):
- ☐ ₂ Newspaper/magazine
- ☐ ₅ TV/radio
- ☐ ₈ Local tourism bureau
-
- ☐ ₃ State Travel Office
- ☐ ₆ Airline/travel agency
- ☐ ₉ Visitor/welcome center

3. **While on this trip**, which of the following activities will members of your travel party participate in? *(Please mark all that apply.)*

General:

- ☐ ₁ Casino gaming
- ☐ ₂ Dining out
- ☐ ₃ Driving on designated scenic byways
- ☐ ₄ Nightlife/evening entertainment
- ☐ ₅ Sightseeing/driving for pleasure
- ☐ ₆ Taking in city sites
- ☐ ₇ Viewing fall colors

Attending:

- ☐ ₈ Classical music concerts
- ☐ ₉ Fairs or festivals
- ☐ ₁₀ Popular music concerts/shows
- ☐ ₁₁ Professional sporting events
- ☐ ₁₂ Amateur sporting events
- ☐ ₁₃ Theater performances
- ☐ ₁₄ Other events

Participating in:

- ☐ ₁₅ Biking
- ☐ ₁₆ Canoeing
- ☐ ₁₇ Golfing
- ☐ ₁₈ Fishing
- ☐ ₁₉ Hiking
- ☐ ₂₀ Motor boating/water skiing
- ☐ ₂₁ Off-road ATV driving
- ☐ ₂₂ Pool swimming
- ☐ ₂₃ Lake/river swimming
- ☐ ₂₄ Jet skiing
- ☐ ₂₅ Wildlife viewing/bird watching
- ☐ ₂₆ Hunting
- ☐ ₂₇ Cross-country skiing
- ☐ ₂₈ Downhill skiing/snowboarding
- ☐ ₂₉ Ice fishing
- ☐ ₃₀ Snowmobiling
- ☐ ₃₁ Other activity

Visiting:

- ☐ ₃₂ Amusement parks/carnivals
- ☐ ₃₃ Art museums
- ☐ ₃₄ Other museums
- ☐ ₃₅ Friends or relatives
- ☐ ₃₆ Historic sites
- ☐ ₃₇ Indian areas
- ☐ ₃₈ Indoor water parks
- ☐ ₃₉ Outdoor water parks
- ☐ ₄₀ State/national parks
- ☐ ₄₁ Other attraction

Shopping:

- ☐ ₄₂ For gifts or souvenirs
- ☐ ₄₃ Outlet shopping
- ☐ ₄₄ Arts, crafts, antiques
- ☐ ₄₅ At the Mall of America
- ☐ ₄₆ General/mall shopping

4. How many nights **in total** do you intend to stay in either this town or city or the immediate surrounding area on this trip? *(Please write in the boxes provided.)*

of Nights in total:

5. How many nights have you already spent in this area on this trip? *(Please write in the boxes provided.)*

of Nights already spent:

6. Are you staying overnight (either last night or tonight)...

In paid accommodations:

- ☐ ₁ At a hotel/motel/historic inn
- ☐ ₂ At a Bed and Breakfast
- ☐ ₃ At a vacation home/condo/cabin/houseboat you rented
- ☐ ₄ At a resort (cabin/other indoor unit)
- ☐ ₅ In an RV at a campground
- ☐ ₆ In a tent at a campground

In accommodations with no charge:

- ☐ ₇ At the home of family or friend
- ☐ ₈ At vacation home/condo/cabin/houseboat of a family or friend
- ☐ ₉ At your vacation home/condo/cabin/houseboat
- ☐ ₁₀ At a campground with no fee

7. **Not** including this trip, how many times in the **last 5 years** have you taken a pleasure trip in Minnesota?
- ☐ None

☐ 1

☐ 2 to 4

☐ 5 to 10

☐ More than 10
8. Including yourself, how many people are in your immediate travel party? *(Please do **not** include your entire group if traveling on an escorted group tour, on business, or attending a convention/conference.)*
- # in Immediate Travel Party:
9. How many of those people are...
- Younger than 6 yrs old

6-11 yrs old

12-17 yrs old

Adults
10. Please tell us the amount **you and your immediate travel party** spent during **the past 24 hours in this area** in each of the following categories listed below. A few examples for each category are provided. If you have just arrived in this area, please estimate your expenses for the next 24 hours.

Spending Category	Amount Spent
a. Lodging and Camping Accommodations (Fee FOR ONE NIGHT) <i>If you have not paid yet, estimate one night's cost.</i>	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
b. Food and Beverages (meals, snacks, groceries, beer/wine/liquor "by the drink")	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
c. Liquor Purchases (beer/wine/liquor "by the bottle")	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
d. Sport Fees (outfitters, guides, gear rentals, greens fees, lift tickets)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
e. Events Admissions (sporting events, popular concerts, festivals)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
f. Cultural Performance Admissions (tickets for theater, opera, classical concerts, dance)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
g. Other Evening Entertainment (movies, clubs, lounges, etc.)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
h. Historic/Cultural Site Admissions (historic homes, sites, museums, exhibitions)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
i. Other Sightseeing/Attractions (tours, admissions)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
j. Shopping - Tourist (gifts, souvenirs, antiques, arts and crafts)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
k. Shopping - General (clothing, personal or household items)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
l. Ground Transportation (gasoline, parking, local bus, taxi, car rentals)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
m. Lottery Tickets (scratch-off tickets, Powerball, etc.)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
n. Gaming (gambling and legal betting activity)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
o. Licenses/Registrations/Permits (fishing, hunting, ATV, snowmobile, trail pass)	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>
p. All other, please explain: <div></div>	\$ <div><div></div><div></div><div></div><div></div></div> . <div><div>0</div><div>0</div></div>

Now, a few questions for classification purposes only:

11. What is your age, please?
-
12. What is your total annual household income before taxes?
- ☐ ₁ Less than \$25,000

☐ ₃ \$35,000 – \$49,999

☐ ₅ \$75,000 – \$99,999

☐ ₇ \$125,000 – \$149,999

☐ ₂ \$25,000 – \$34,999

☐ ₄ \$50,000 – \$74,999

☐ ₆ \$100,000 – \$124,999

☐ ₈ \$150,000 or more
13. Are you:
- ☐ ₁ Male

☐ ₂ Female
14. Are you: *(Please mark all that apply.)*
- ☐ ₁ American Indian

☐ ₂ Asian

☐ ₃ Black

☐ ₄ Hispanic

☐ ₅ White

☐ ₆ Other
15. Are you currently a resident of:
- ☐ ₁ United States

☐ ₂ Canada

☐ ₃ Another country

Current Home Zip Code:

For validation purposes only, we will randomly contact participants to verify their answers. Results will not identify you with your answers and all answers will be reported in total. Your personal information will never be sold or used for marketing. Please provide us with the following information.

Name: Phone Number: ()